

OCTOBER 1989

SECURITY

THE MAGAZINE FOR SECURITY DECISION MAKERS

Equipment Focus:
Kicking Tires
on Motorized Carts

DATA BANK
BONUS INSIDE!
Profiling Security
on the Job

Training the
New Breed



Jeff Dingle
Program Coordinator
Federal Law Enforcement
Training Center

CAUTION-AUTOS ONLY
DO NOT EXCEED 10 MPH OR 1000 LBS

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SECURITY

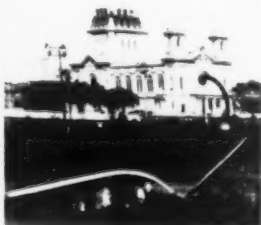
THE MAGAZINE FOR SECURITY DECISION MAKERS

A CAHNERS PUBLICATION/VOLUME 26, NUMBER 10/OCTOBER 1989

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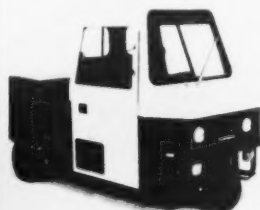
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SECURITY (ISSN 0890-8826) is published monthly by The Cahners Publishing Company, A Division of Reed Publishing USA, 275 Washington St., Newton, MA 02158-1630. Terrence M. McDermott, President; Charles E. Moodhe, Senior Vice President/General Manager, Chicago Division; Jerry D. Neth, Vice President/Publishing Operations; J.J. Walsh, Financial Vice President/Magazine Division; Thomas J. Dellamaria, Vice President/Production and Manufacturing. Circulation records are maintained at

Cahners Publishing Company, 44 Cook St., Denver, CO 80206-5800. Phone: 303/388-4511. Second-class postage paid at Denver, CO 80206-5800 and additional mailing offices. Postmaster: Send address corrections to **SECURITY** at our Denver address. **SECURITY** copyright 1989 by Reed Publishing USA; Ronald G. Segel, Chairman and Chief Executive Officer; Robert L. Krakoff, President and Chief Operating Officer; William M. Platt, Sr. Vice President. Annual subscription rates for non-qualified people: USA, \$50; Canada/Mexico, \$75; other countries, \$100 for surface mail and \$140 for air mail. Special issues, including product directory, are \$25. Except for special issues where price changes are indicated, single copies of regular issues are available for \$10, \$14 and \$18 (USA, Canada/Mexico and foreign). Please address all subscription mail to John Bowman, 44 Cook St., Denver, CO 80206-5800.

SECURITY INDICATORS

Trends and forecasts for determining loss prevention needs.

SECURITY CAREERS

New Tasks Redefine Security Role

Security decision makers are busier than ever, according to SECURITY Magazine's Third Quarterly Telephone Survey.

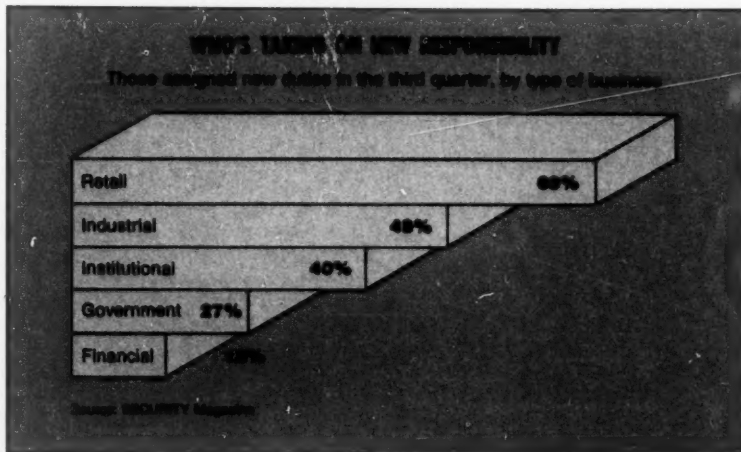
One hundred security decision makers were asked: "Have you taken on additional responsibility in the last quarter?" The response: 43 percent say they assumed new responsibilities in the second quarter.

Retail security decision makers were most likely to have acquired new duties

— 69 percent say they have taken on new tasks in the last quarter. Forty-nine percent of industrial security decision makers, 40 percent of institutional, 27 percent of government and 13 percent of financial also report having new responsibilities.

When it comes to naming the additional tasks, 25 percent of respondents say they are now responsible for organizing safety-related functions that include chemical awareness, fire safety, evacuation planning and the disposal of hazardous materials.

Other common new responsibilities include administering drug tests, heading a drug and alcohol abuse program and teaching personnel about security

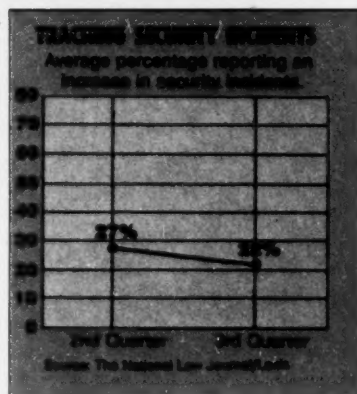


Security's responsibilities are growing, especially for safety-related functions.

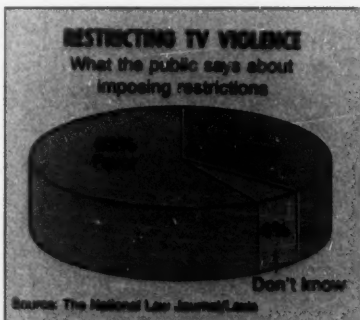
measures. New responsibility means more supervision for security.

SECURITY Magazine's quarterly tracking question "Has the number of security incidents increased, decreased or remained the same over the past three months?" revealed the government leading the way in security incidents in the second quarter.

While an average 22 percent of respondents report an increase in security incidents, 40 percent of government security decision makers report an increase. Twenty five percent of respondents report an incident decrease; institutions saw the largest decrease at 52 percent.



SECURITY's third quarterly survey shows an incident decrease.



Public speculation linking TV violence to crime is intensifying.

CENSORSHIP

TV Violence Falls Under Public Scrutiny

Many Americans aren't willing to pay more to fight crime, but they are ready to take action when it comes to curbing television violence, says a National Law Journal/Lexis poll. Americans are fed up with the amount of violence on TV, the poll says.

By a 68 percent to 3 percent majority, respondents agree that television's depiction of crime and violence tends to encourage rather than discourage

crime, while 25 percent see no effect. And by a 63 percent to 33 percent majority, Americans are in favor of laws restricting TV violence.

The belief that TV encourages crime and should be controlled is strongest among less-wealthy, less-educated people — that is, those who watch it the most. But strong majorities in every category except \$75,000 income-households support restrictions.

A spokesperson for the National Association of Broadcasters responds to the poll's findings of support for restrictions by pointing out that crime shows continue to run because the public keeps tuning in.

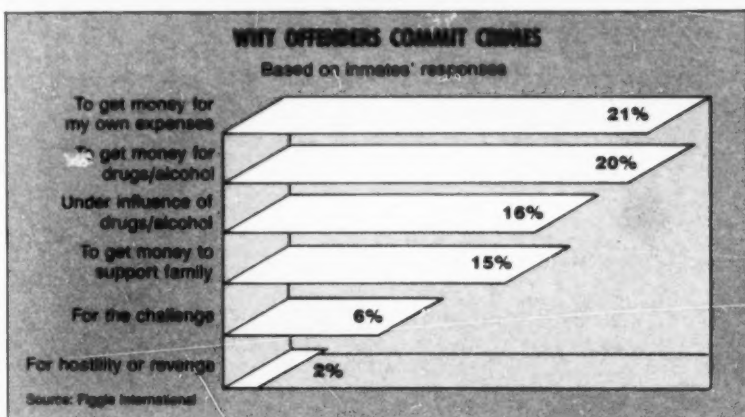
CRIME: REASONS

Inmates Cite Reasons For Committing Crimes

When it comes to offenders' reasons for committing crimes, making ends meet is the top reason, according to a Figgie International Report.

Interviews with nearly 600 imprisoned property crime offenders reveal that the biggest reason offenders commit crimes is to "get money for my own expenses." This reason is followed by getting money for drugs or alcohol, being under the influence of drugs or alcohol and getting money to support the family.

An overwhelming 36 percent of the sample claim that their motivation to commit property crime was drug- or alcohol-related. According to the economic perspective, motivation in these cases involves substances for which there are no substitutes, making the po-



Inmates' admissions strengthen the notion that links crime and drugs.

tential benefits of the crime outweigh almost any cost.

Property crime offenders begin their careers early. More than half of the inmates surveyed were under age 14 when

they committed their first crime, with age 12 the most common response. Only 14 offenders said they were more than 30 years old when they committed their first crime.

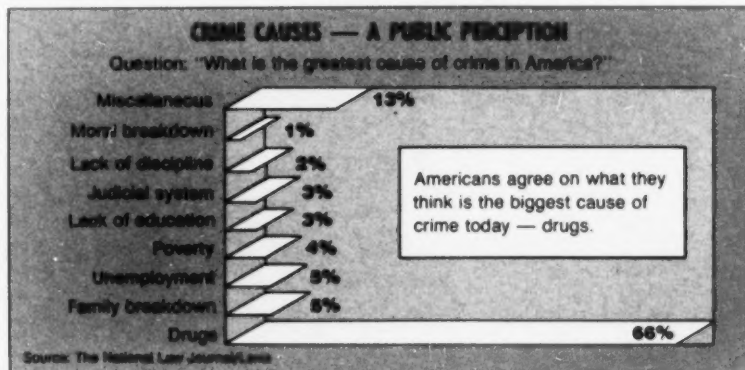
CRIME: CAUSES

Americans Blame Drugs for Nation's Crime Problems

Americans have reached a common conclusion on the source of today's crime problems, according to a survey by the National Law Journal/Lexis. When asked "What do you think is the greatest cause of crime in America today?", 66 percent of respondents replied "drugs."

Only 12 percent of respondents cited social problems such as the education system, unemployment or poverty as causes of crime.

Among the respondents, 47 percent believe drug dealing should be the justice system's top priority, with mugging and rape running second at 32 percent. Those surveyed also call for stiffer sentences, more police, a less lenient jus-



To combat crime, Americans call for a variety of measures that focus on drugs.

tice system and a variety of measures focused on drugs.

A Dade County (Fla.) study backs up the public's perception by reporting that officials there have learned that

254 hard-core juvenile crack cocaine users were responsible for 223,000 crimes in the previous year — that's 880 crimes per juvenile. Just one of 555 crimes resulted in an arrest.

NEWS

Security Wrap-Up: Ethics, Cash, Access

► For the second consecutive year, United States office workers have reported the **honesty and ethical behavior** of company management as their top concern, according to the 1989 Office Environment Index. Many workers believe that top executives are more honest with government authorities, customers, suppliers, vendors and stockholders than with employees.

Restructures, mergers and acquisitions within organizations may contribute to workers' mistrust in top management, says one industry source.

► Nearly 80 percent of the United States' national cash is "missing." The Federal Reserve can only speak for 14 percent of the \$243 billion in hard cash circulating outside the nation's banks. It suspects that people in the underground economy — drug dealers, tax evaders and organized crime figures — hold another 5 to 6 percent of the cash. Experts believe the missing 80 percent of the cash has made its way, legally or illegally, into foreign countries such

as Poland and Southeast Asia where it is used as underground currency. Another possibility: The nation's underground economy is larger than previously estimated — as large as \$100 billion, one source predicts.

► American businesses last year lost \$555.5 million, 930 man years of work and 125 man years of computer time from **unauthorized access to computers**. As a result, the computer protection market is in a healthy growth phase. It's particularly difficult to protect computer networks, which are expected to increase by 41 percent to \$929.5 million.

Security in the '90s: Decision Makers Stick With What They Do Best

The security industry gains momentum as decision makers stay with their organizations longer.

By Brenda Moss
Staff Editor

Security continues to improve its services as well as itself, according to SECURITY Magazine's every-two-year Profile Study of security decision makers in U.S. business and government. Compared with responses to the 1987 Reader Profile Study, the 500 security decision makers who completed the 1989 survey say they're better educated and they're staying longer with one organization.

Who The Survey Represents

Institution-based security decision makers participated most in this survey

(26 percent). Other groups represented were government (16 percent), health care (15 percent), financial (15 percent) and retail or wholesale (15 percent). Other respondents represent service industries, manufacturing, industry and consulting.

Nearly a third of respondents, 32 percent, reported that their organization's annual revenues were between \$10 million and \$100 million. Twenty-six percent of respondents report that their company employs more than 1,500 people.

Almost half of the respondents — 46 percent — describe their job as security management, while 25 percent say they are facility or operations managers.

The scope of authority appears to be narrowing. In 1989, 66 percent manage security operations and staff; 78 percent did so in 1987. And 61 percent say they specify security equipment and services, as opposed to 68 percent in 1987.

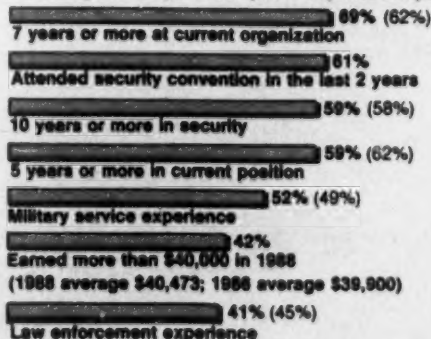
What They Do

More than half of respondents have responsibility for the security of their entire organization, up 3 percent from 1987. Consultants and security services are most likely to be given full responsibility for security; 75 percent according to the survey.

Thirty-eight percent secure their local facility, with industrial and manufacturing leading the way at 56 percent.

PROFESSIONAL PROFILE: SECURITY DECISION MAKERS

Percentage of Respondents (1987 responses in parenthesis)

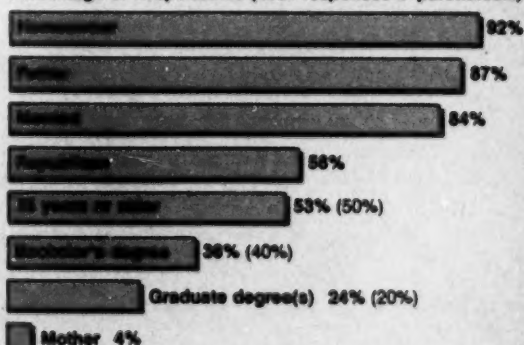


Source: SECURITY Magazine

Security decision makers are staying longer with their employers and current positions.

UP-CLOSE AND PERSONAL: SECURITY DECISION MAKERS

Percentage of Respondents (1987 responses in parenthesis)



Source: SECURITY Magazine

Two years hasn't changed the fact that security is dominated by male homeowners.

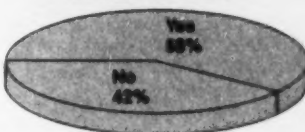
Nine percent are responsible for their regional facility, 8 percent for corporate headquarters and 2 percent for international operations.

Primary job responsibilities are diverse. Administrative or management services tops the list at 24 percent. Another 20 percent say general security, 14 percent operations and 11 percent say buildings and grounds maintenance. Thirty-eight percent devote between 1 and 10 percent of their time per week to security and security-related activities. On the opposite end, 19 percent spend 100 percent of their time working on security.

Security and Organizations

Security's chain of command most often starts with a CEO, president or group vice president. Other reporting structures include other general man-

ORGANIZATIONS THAT MADE SECURITY-RELATED EXPENDITURES IN ADDITION TO THE SECURITY BUDGET IN 1988



Source: SECURITY Magazine

Outside-the-budget security-related expenditures are commonplace.

agement (22 percent), operations (10 percent) or another vice president (6 percent).

The Profile Study also offers a look at security's responsibility.

The security department is responsible for the security of an organization's

assets and premises only 51 percent of the time. Building maintenance is responsible 21 percent of the time and operations is responsible 17 percent of the time. Police, administration, corporate services and personnel are responsible in some cases.

On the supervisory end, 45 percent of respondents report that they supervise between one and 10 people. Sixteen percent supervise 20 to 39 people.

Eighteen percent of organizations have between 7 and 10 persons on staff whose work is security-related. Sixteen percent employ 31 or more.

Fire protection is a top priority at many organizations; 84 percent use this measure. Runners-up include intrusion detection (68 percent), alarm monitoring equipment (68 percent), safes and vaults (67.5 percent) and electronic access control (59 percent).

In the Limelight — Security at Waste Management

According to Richard Sem, CPP, director of corporate security for Waste Management, Oak Brook, Ill., security and risk management serve as part of the conscience center in the emotionally-charged business of maintaining the environment.

"We want to do what's right for the environment and for the public. Everybody generates waste, but nobody wants it near them," says Sem, age 41. "Therefore, our company is in the limelight locally and nationally."

Sem's security career began when he worked as a security officer while attending Marquette University, where he earned a bachelor's degree in psychology. Following graduation, he managed a guard company and in 1981 he started a security consulting business for Midwest companies. Sem has been with Waste Management, a former consulting client, since 1985.

Corporate security is a two-man department. Sem and Ray Turek, CPP, manager of security, advise facilities on expenditures and act as in-house consultants to support the company's security policies.

Waste Management's policy and procedure manual calls for physical security including locks, guards, alarms, CCTV and intrusion and fire

detection; emergency management; information protection; and computer security. Sem and Turek advise on expenditures; they do not directly control the security budget. This reflects the decentralized nature of the company.

Because of the company's unique business, security occasionally faces peaceful demonstrations organized

by people outside the company who are concerned about the environment. It's security's responsibility to make sure that all involved use restraint when handling this situation.

Although Sem acknowledges the rights of peaceful demonstrators, he says activist groups targeting companies pose a growing risk. For example, some may use stockholders meetings as a forum to publicize views.

Dealing with people inside and outside the company is a primary security task. Each week, Sem and Turek visit four or five facilities and give security presentations to groups of Waste Management's 36,000 employees. The employees bolster internal security efforts.

"We take a strong, proactive stance on employee relations," Sem says. "We want to keep the losses from occurring in the first place. We encourage employees to be aware and report unauthorized people in their work areas."

"The best security is carried through by the employees," Sem says. "Security people who are cynical of employees form a roadblock. Most employees are honest, and they should be an inspiration to others."

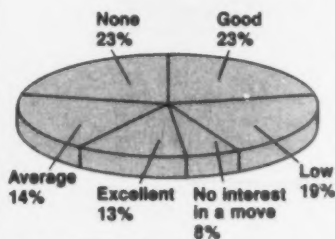


"When people express themselves, we try to establish a friendly profile."

RICHARD SEM, CPP
Director of Corporate Security
Waste Management, Oak Brook, Ill.

Security Enjoyed Bonuses and Profit Sharing Averaging \$29,870 in 1988

PROSPECTS FOR PROMOTION WITH CURRENT EMPLOYER



Source: SECURITY Magazine

Respondents are not overly optimistic about their prospects for promotion with current employers.

As for security budgets, there is diversity among organizations.

Working on a Budget

Twenty-three percent of respondents work with a security budget of less than \$25,000 a year. Thirty percent, however, work with budgets ranging between \$100,000 and \$500,000 a year. Eight percent work for an organization with a security budget greater than \$1 million.

Yet budgets don't necessarily put a lock on security's spending power. During the last year, 59 percent of organizations made expenditures for security-related equipment or services in addition to the security budget. These additional expenditures were budgeted in capital spending (45 percent), remodeling or renovation (44 percent) and new

construction (30 percent). Additional money also went for communications, consultants, intrusion detection enhancements, uniforms and vehicles. The most common value of additional expenses was between \$20,000 and \$49,000.

The power to authorize the purchase of security equipment and services has remained stable over the past two years.

When it comes to rating the performance of security operations, 45 percent of organizations use supervisor conferences. Other common assessments include an annual report with statistics and a management by objectives report.

Getting Personal

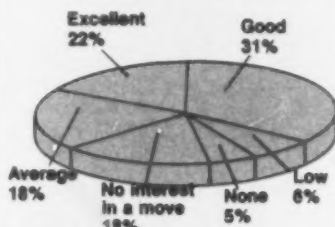
Security is still predominantly staffed by men: 94 percent of respondents were male.

It's a slightly older group than in 1987. Fifty-three percent of respondents are 45 or older, compared with 50 percent in 1987. Just 7 percent are 30 or under, while 21 percent are above 55.

In addition to being slightly older in 1989, security decision makers overall are also better educated. Thirty-six percent earned bachelor's degrees — as opposed to 40 percent in 1987 — but 24 percent earned graduate degrees, a 4 percent jump since 1987.

Security decision makers report slightly more military experience in 1989, 52 percent vs. 49 percent in 1987. Respondents in 1987 were more likely to have law enforcement experience, however. Today, forty-one percent have law enforcement experience, compared

PROSPECTS FOR UPGRADED POSITION ELSEWHERE



Source: SECURITY Magazine

Employment with a new organization breeds optimism among security decision makers.

with 45 percent in 1987.

One emerging trend is for security decision makers to stay with their positions and organizations longer. In 1987, 62 percent of security decision makers had been at their current organization for 7 years or longer. Two years later, that figure jumped to 69 percent.

The security industry as well is holding its own when it comes to retaining personnel. In 1987, 59 percent of respondents reported being with security for 10 years or more; today 58 percent report this.

Promotions and Benefits

Security decision makers are also holding their current positions for longer. In 1987, 59 percent of respondents had spent 5 years or more in their current position; today it's 62 percent. This trend could indicate promotion obstacles.

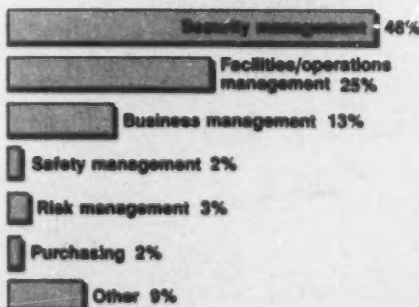
Of respondents, 23 percent say their prospects for promotion at their current organization is good. Another 23 percent say they have no prospects for promotion with their current employer.

Moving to another organization looks like a good idea. Twenty-two percent say they have excellent prospects for an upgraded position with another organization, and 32 percent say promotion prospects would be good if they moved to another company. These figures convey frustration toward the current employer.

Security's continuing education needs are recognized; 57 percent of respondents are entitled to tuition reimbursement. Other benefits include profit sharing and a pension plan, stock

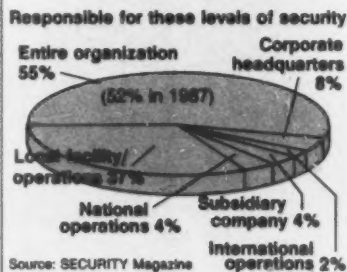
Almost half of security decision makers define their jobs as "security management".

SECURITY DECISION MAKERS CATEGORIZE THEIR JOBS



Source: SECURITY Magazine

SCOPE OF RESPONSIBILITY FOR SECURITY DECISION MAKERS



More than half of the respondents oversee security for the entire organization.

and \$45,000 annually.

The total budget for security expenditures strongly impacts earnings. Salaries fall below \$30,000 for the highest percentage of those whose total budget is less than \$50,000 per year. Salaries jump to the \$35,000 to \$40,000 range

for the highest percentage of those whose budgets are between \$50,000 and \$1 million. Of those with budgets exceeding \$1 million, salaries jump to \$45,000 to \$70,000.

Keeping Current

Continuing education interests security, yet is not always feasible.

Less than two thirds of respondents attend security-related meetings or conventions; 61 percent say they attended a convention in the last two years. Of those who attended conventions, 60 percent attended meetings in the local area, while 33 percent traveled to another region of the country. Less than 1 percent of respondents traveled outside the country to attend a convention. Thirty-seven percent do not intend to attend any security-related meetings in the next year. Convention attendance findings have remained stable since 1987. □

3M Security Team Makes Business Sense

Robert Hayes is part of a 10-member security team at 3M Corporate Headquarters, St. Paul, Minn., that is doing all it can to keep pace with the company's achievements.

3M security's clients can include any one of its 82,800 employees working in 250 U.S. facilities or 50 foreign countries, its customers, contractors and distributors or anyone else with a 3M security-related problem.

3M's corporate security services team includes specialists with backgrounds as diverse as the services they provide. Team members include business professionals, an auditor, an architect, former FBI agents and career security personnel. Hayes, age 38, is a security specialist

A security professional since 1980, Hayes earned a criminal justice degree from Florida International University. Before joining 3M in 1986, he was director of security for a large medical center and director of security for a municipally-owned public utility.

"Security used to apply a technique or technology to a situation," Hayes says. "Now we're

idea brokers who review new business trends and develop options and solutions that customers can support and live with."

Mergers and acquisitions present one of the many new security challenges for the 1990s. All new



"Security's credibility must be estimated on the client's terms."

ROBERT HAYES
Security Specialist
3M, St. Paul, Minn.

employees must be welcomed to a restructured company, Hayes says, including those who harbor ill feelings about the change. Security must minimize internal risks until these ill feelings can be addressed.

Another challenge is balancing security concerns as the relationship between companies and their vendors and suppliers gets closer. Security will have to help manage the risks presented by increasing numbers of authorized, but relatively unknown, non-company personnel in the workplace.

Hayes points out that security's success is dependent upon opening the lines of communication between all departments and levels.

"Establish a security relationship with sales and marketing, research and development, manufacturing and other staff groups as well as company executives," Hayes says. "Talk to them in terms of the security of business strategies, not security concepts."

"You want to be in the design phase of any business plan, and to do this, security's credibility must be established on the client's terms," Hayes says.

More Safety! Less Security?

Downsizing, technology, outside services bring security and safety together.

By Bill Zalud
Editor

Security and safety are coming together, with security often emerging as the dominant area.

More organizations now define some safety needs and tasks under the security banner. And even systems — especially fire code-specific life safety — have more and better connections to security, facilities management and process control.

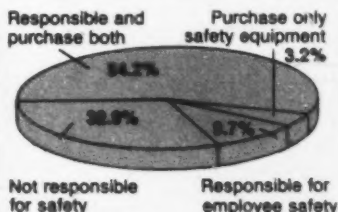
Security's Home Base

Where safety was a department equal to security, a growing number of reorganizing companies now place it within the security area. Where safety is a shared task anyway, security is a natural home base from which to conduct programs aimed at a secure and safe working environment.

This togetherness of security and safety has many inherent opportunities as well as a few dangers.

SECURITY ADDS SAFETY

Security decision makers whose responsibilities include safety.



Source: SECURITY Magazine

More than a majority of security decision makers also manage safety needs.

Obviously, the responsibility and budget of traditional security may grow. At the same time, the shift may burden security with an alien set of duties and safety engineering needs. There's the possibility that in taking on more as-

Downsizing makes two departments into one.

signments, security loses sight of its original mission.

According to a recent national study, conducted by the SECURITY DATA BANK, a majority of security decision makers (54 percent) indicate they already have some safety responsibilities.

SPENDING SAFETY DOLLARS

Where security decision makers budget dollars for safety equipment purchases.

Budget Line	Who Budget's Safety Here
Building maintenance	39.2%
Security	34%
Safety	29.3%
Facilities/Operations	26.1%
Capital spending	14.4%
Remodeling/Renovation	7.9%
New construction	7.7%
Parking/Grounds	6.8%
Human resources	5.6%
Office services	5.6%
Other budget lines	4.7%

Source: SECURITY Magazine

Most safety equipment money is in operation and maintenance of facilities. Significant safety monies are budgeted in the security area. Total exceeds 100% due to multiple responses.

The sharing increases the total budget, especially in the areas of facilities management and operations.

For instance, additional safety dollars fall — most often — into four budget categories: 39 percent in building maintenance; 34 percent in security; 29 percent in safety; and 26 in facilities/operations.

The building improvements budget also attracts additional safety dollars controlled by security.

Safety Brings More Dollars

On the average, security decision makers who have safety responsibilities have an additional \$80,350 in their budget tied specifically to safety.

This coming together is most often seen in organizations where security is a positive influence. Yet it is not a universal occurrence.

For example, a recent poll of all business and industry groups, conducted by Globe Research for *The Personnel Journal*, found many organizations still maintain two separate departments (security and safety) and two separate types of systems.

The Globe Research study also discovered that 77 percent of all organizations have fire alarm equipment, while having less security equipment: 62 percent have security alarm equipment and 37 percent have CCTV.

SAFETY DOLLARS SPENT

The organization's total safety expense budget.



Average per respondent

Source: SECURITY Magazine

Security decision makers who also have safety responsibility add to their spending power.

SERVICES

A guide to selecting and staying informed on security services.

Honesty Testing Endures Acid Test

By Rebecca D. Russell
Senior Editor

Honesty testing has been touted as the natural next step for companies stripped of polygraph use in 1988.

Yet one year later, SECURITY DATA BANK research shows that nearly two-thirds of security decision makers questioned say their organizations do not use psychological testing as part of pre-employment screening.

Why? Many potential users are unclear about testing. Others fear honesty tests will follow polygraph into extinction — so why get started on something if it's only going to be taken away?

Publicity surrounding recent legislative action appears to support fears. Several states are considering measures that would impose restrictions on testing. Massachusetts already limits testing's influence. At the federal level, legislation introduced or considered may impact the use of testing.

And, two influential organizations are taking a look at honesty testing: the American Psychological Association

and the Office of Technology Assessment.

In spite of this activity, test publishers remain confident that honesty testing is here to stay. Scrutiny gives them an opportunity to clarify what pre-employment testing is all about.

It gives security decision makers a chance to learn more as well.

Investigating for Clarity, Uniformity
Psychological testing encompasses

Test scrutiny gives security decision makers a chance to learn more.

honesty and integrity tests and has been available for decades. Ideally, honesty tests are administered to job applicants whose work will put them in a position to commit theft or deviance on the job. The tests forecast the potential for future behavior and track attitudes.

Unlike polygraph testing, honesty testing can be backed up by research that shows its validity. While tests are a tool to identify attitudes which could lead to future behavior, polygraph results — which show admissions of past

behavior — may or may not indicate future behavior.

Two national organizations currently have ongoing investigations to look at testing. The goal is to better define honesty testing and how companies can best purchase and administer this pre-employment screening tool.

At the request of a Congressional committee, the Office of Technology Assessment (OTA) set up a study group to check on honesty test validity.

Nancy Carson, OTA's Science, Education and Transportation program manager, says the group gets its validity information from test publishers' documentation. Results should be available near the end of the year.

"It's a much more difficult area to form boundaries," Carson says. "You're entering the area of types of tests and it gets more complicated."

An early-summer meeting of OTA's appointed study group and invited guests highlighted OTA's challenges.

One member of that study group is John Jones, Ph.D., vice president of research and development with London House, Park Ridge, Ill. He says the study group worked to show OTA documented relevancy between integrity tests and specific jobs; to show that the tests are given to people if the job involves the chance to commit theft or deviance.

Jim Walls, executive vice president, Stanton Corp., was invited to hear the study group's findings. He observed "strong support from the professional committee that professionals are doing their homework and doing what they should to keep the tests valid."

One chief concern of honesty tests was presented by organized labor. Legal representatives are concerned that honesty tests screen out people that are prone to union.

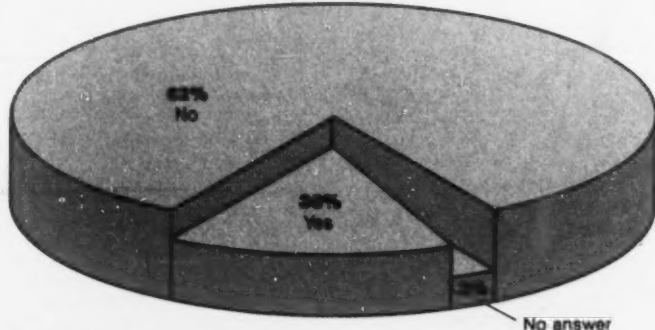
Industry leaders swiftly nixed that concern, Walls says. "No one puts questions like that into these tests — we have no interest in it."

A Psychological Review

The American Psychological Association (APA) is also looking into psychological tests — for the first time. Wayne Camara, APA's director of scientific affairs, says, "Five years ago we didn't see the number of products we see to-

PSYCHOLOGICAL TESTING USE

Security decision makers reporting company use of psychological testing as part of pre-employment screening.



Source: SECURITY Magazine

Nearly one-third of security decision makers questioned report that their organizations use psychological testing as part of pre-employment screening.

day. The field has expanded rapidly and we haven't paid a lot of attention."

Consequently, the APA has no formal position on honesty tests, making it difficult to advise organizations about their use. Task force findings will enable APA to address that issue in the future. Camara anticipates completion in mid-1990.

One wrinkle in the study: After asking test publishers for validity information nearly one year ago, one-third of test houses did not respond. Camara says this is a concern since reputable honesty test publishers should be able to provide proof of test validity. He adds that the non-response is from primarily small, relatively new organizations.

Beyond Review

OTA and APA scrutiny raises several other important testing issues.

One is the size of the industry. Psychological testing encompasses government, personality, school aptitude and intelligence testing — which would make it difficult to ban honesty testing only. "They can't knock off a small piece without taking on the whole," says Ryan Kuhn, president, Reid Psychological Systems, Chicago.

Adds Walls, "Honesty can't be singled out. They now realize that what applies to one applies to all."

OTA and APA are also looking at whether testing is invasive. Says Jones, "We come from a test-taking culture.

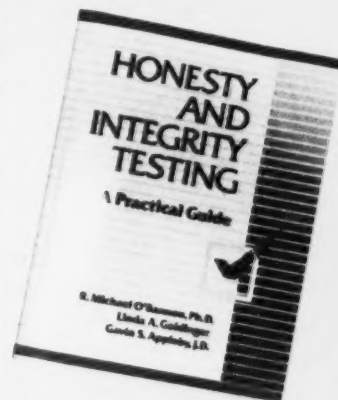
Back to the Books: A Testing Primer

If you're looking for more information about honesty testing, a new book can help. *Honesty and Integrity Testing: A Practical Guide*, is a sourcebook published by Applied Information Resources, Atlanta.

Chapters look at the advantages and disadvantages of testing, how to decide if it's a tool your organization wants to use, and how to choose among available tests. Included is detailed information about more than 40 tests now on the market.

Authors are a management psychologist, a human resources consultant and a labor attorney.

For more information about this guide, circle 139 on the Reader Service Card.



Practical advice is available.

People are not offended," as they were with polygraph.

Says Kuhn, "Our tests have a direct purpose, and our questions are clearly related to issues of integrity. We don't get into other areas."

In keeping with their intended purpose, honesty tests do not ask personal questions, only those that will identify tendencies.

When carefully chosen, investigated and administered, testing is one valu-

able hiring tool — only effective when used with quality interviewing and screening.

"Employers see a definite need to find a device to help make a decision," says Walls. "The test is not the final decision."

Says Kuhn, "We're the best thing employers have going. As a decision maker, I'd want to take advantage of the best tools I find and use them as long as I can."

SERVICE BRIEFINGS

► **Strategies to employ older Americans in the workplace** are gaining appeal, especially as business faces fewer qualified young people.

That's the thrust of a newly-released study from The Conference Board, a New York-based worldwide business network that conducts research and holds a variety of forums for business leaders.

The report, "Employing Older Americans: Opportunities and Constraints" reveals that older workers have considerably lower voluntary turnover rates than younger workers, for instance.

Says Daniel E. Knowles, vice president, human resources planning for Grumman Corp., "All things being equal, firms may be better off hiring a 45-year-old than a 25-year-old. Older workers tend to be more satisfied with work that is inherently interesting, requires significant attention to detail and involves responsibility."

► **The National Institute of Standards and Technology** — formerly the National Bureau of Standards — recently issued a **computer-based safety analysis program**. *Hazard I* includes a three-volume report and computer disks.

Using fire modeling, the program runs on a personal computer. It predicts the hazards to occupants in a burning building, plus shows how products — such as furniture — contribute to those hazards. It can be used in a variety of fields: fire investigation and reconstruction, fire protection engineering, and architectural design.

For purchase information write the National Fire Protection Association, 1 Stop Data Shop, Batterymarch Park, Quincy, Mass. 02269; or the National Technical Information Service, Springfield, Va. 22161 and ask for PB# 89-215404.

► **Drug crackdowns are growing and convictions bring longer sentences**

says a new Department of Justice report.

Attorney General Dick Thornburgh announced recently that in 1988, 900 indictments named 3,000 defendants as a result of investigations and prosecutions conducted by Department of Justice Drug Enforcement Task Forces. In the program's 6 years, close to 5,000 indictments have named nearly 17,000 defendants.

Statistics of drug activity show:

- Cocaine was mentioned in more than 80 percent of the investigations and two-thirds of the indictments.
- Marijuana trafficking was involved in 45 percent of the investigations.
- Heroin trafficking was part of 24 percent of the cases.
- In 1988, convicted traffickers were sentenced to an average 16½ years in prison, up 20 percent from 1987.

A CAHIERS PUBLICATION/DECEMBER 1989

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SECURITY BONUS:
Executive Update
on Contract Services

SECURITY

THE MAGAZINE FOR SECURITY DECISION MAKERS

Details
on ISC in
Orlando
Inside!



SECURITY

THE MAGAZINE FOR SECURITY DECISION MAKERS

A CAHNERS PUBLICATION/VOLUME 26, NUMBER 12/DECEMBER 1989

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Centralized monitoring works. (p. 14)

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Security services cover assignments from airports to doorways. See the BONUS Pullout Section. (p. 41)

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Richard Mustafa, chief security administrator, Detroit's Department of Water and Sewerage, succeeds by stressing cooperation. (p. 24)

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Video security blends card access with computer-based video. (p. 54)

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SECURITY (ISSN 0890-8826) is published monthly, except for March, June and September when two issues are published in national and separate editions, by The Cahners Publishing Company, A Division of Reed Publishing USA, 275 Washington St., Newton, MA 02158-1630. Terrence M. McDermott, President; Charles E. Moodhe, Senior Vice President; General Manager, Chicago Division; Jerry D. Neth, Vice President/Publishing Operations; J.J. Walsh, Financial Vice President/Magazine Division; Thomas J. Dellamaria, Vice President/Production and Manufacturing. Circula-

tion records are maintained at Cahners Publishing Company, 44 Cook St., Denver, CO 80206-5800. Phone: 303/388-4511. Second-class postage paid at Denver, CO 80206-5800 and additional mailing offices. Postmaster: Send address corrections to SECURITY at our Denver address. SECURITY copyright 1989 by Reed Publishing USA; Ronald G. Segel, Chairman and Chief Executive Officer; Robert L. Krakoff, President and Chief Operating Officer; William M. Platt, Sr. Vice President. Annual subscription rates for non-qualified people: USA, \$50; Canada/Mexico, \$75; other countries, \$100 for surface mail and \$140 for air mail. Special issues, including product directory, are \$50. Except for special issues where price changes are indicated, single copies of regular issues are available for \$10, \$14 and \$18 (USA, Canada/Mexico and foreign). Please address all subscription mail to John Bowman, 44 Cook St., Denver, CO 80206-5800.

SECURITY INDICATORS

Trends and forecasts for determining loss prevention needs.

EMPLOYEE CRIME

Lower Employee Morale, Productivity Top Employee Crime Pricetag

Security decision makers at the International Security Conference in New York City offered a new perspective on the costs of employee crime.

A survey of attendees reveals that indirect costs of employee crime, such as lowered employee morale and loss of productivity, play a more significant, longer-lasting role than the monetary loss calculated following a theft or fraud.

Forty percent of respondents cite lowered employee morale as the most significant indirect cost to a harmed organization. Twenty-two percent say loss of productivity is the greatest indirect cost of employee crime.

SECURITY Magazine's findings sharply contrast with the results of a U.S. Department of Justice study conducted earlier in 1989. The Department's findings place damage to an organization's public image at the top of the list at 31 percent. And only 25 percent cite lowered employee morale as

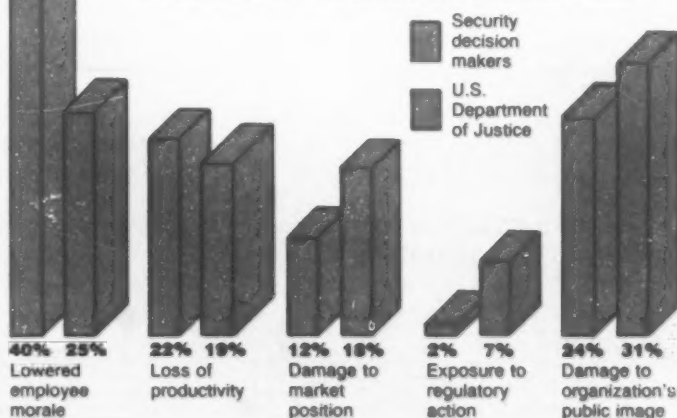
the most significant indirect cost of employee crime.

International Security Conference attendees were also asked about security awareness programs and airport security. When asked to name the best way to increase security awareness within their organizations, a strong majority — 41 percent — say that informational meetings are the best way to increase security awareness. Fifteen percent advocate company newsletters, and 12 percent say internal memos are the best tool. Awareness programs that use task force groups, regular security patrols, brochures, new employee orientation and videotapes all score low in effectiveness.

When it comes to improving airline and airport security, the majority of conference attendees support better training and supervision of airport security personnel. Baggage inspection — both carry-ons and checked baggage — is also a top priority.

THE INDIRECT COSTS OF EMPLOYEE CRIME

Security decision makers vs. the U.S. Department of Justice

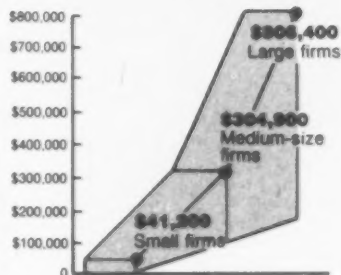


Source: SECURITY Magazine, U.S. Department of Justice

Decision makers say that lowered employee morale is the biggest indirect cost of employee crime. A U.S. Department of Justice study ranks public image first.

SAFETY AND SECURITY EXPENDITURES

What employers are spending



Source: Personnel Journal

Employers spent \$5.2 billion on safety and corporate security in 1988.

SECURITY SPENDING

Alarms, Guard Services Lead Corporate Security Spending

Employers are spending nearly \$250,000 annually per company on safety and security, according to the Personnel Journal Workplace Survey.

For larger organizations with more than 5,000 employees, safety and security expenditures averaged \$806,400. The average for medium-size organizations is \$304,900 and for smaller firms \$41,200.

According to the survey, the foremost expenditure for corporate security is alarm equipment, which is purchased by 62 percent of respondents. Guard services rank second with 51 percent of respondents employing them. Forty-six percent of the companies use employee identification systems; the number rises to 58 percent among larger firms. CCTV is used by 37 percent of those surveyed; the number increases to 61 percent among larger organizations.

When it comes to safety, 77 percent of firms purchase fire alarm equipment, and 49 percent buy safety clothing and equipment. These figures remain constant regardless of company size.

Seventy-six percent of companies surveyed have specific safety and security budgets.

SECURITY SURVEY

Time and Attendance/Access Control Gains Momentum

Time and attendance access control functions are steadily gaining in popularity, according to a SECURITY Magazine telephone survey.

Thirty-four percent of those surveyed say that they currently implement time and attendance as a function of their electronic access control systems. Time and attendance functions are most popular at industrial sites — 51 percent of industrial respondents now use this technology.

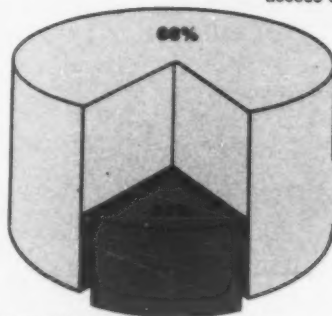
Among respondents who do not currently have time and attendance as a function of their electronic access control system, 24 percent plan to add it in the next year. Government respondents lead the way among those who will buy — 30 percent plan to add time and attendance next year.

Other SECURITY Magazine telephone survey results indicate that security department turnover problems may not be as widespread as previously thought.

Seventy-five percent of respondents say that the turnover rate in their security department isn't a cause for con-

THE TIME AND ATTENDANCE/ACCESS CONTROL UNION

Those who have time and attendance as an electronic access control function



Source: SECURITY Magazine

Twenty-four percent of those who do not currently use a time and attendance function plan to add it next year.

■ Yes

□ No

Time and attendance is an increasingly popular electronic access control function.

cern. A majority of the 25 percent who say that the turnover rate is a problem point to low wages as the cause. These respondents say that in order to lower the turnover rate, hourly and starting wages must be increased and cash bonuses and overtime must be offered. More comprehensive training programs would also help retain employees, they say. A number of respondents, however, say that they do not have enough

control over wages to implement an increase.

Gambling by company employees is not a significant problem for security departments, according to the survey. Just 7 percent say that gambling by employees has been a security problem for their organizations in the last six months. But 13 percent of respondents who work for the government say it has become a security problem.

COMPUTER SECURITY

System Availability Ranked Highest Network Objective

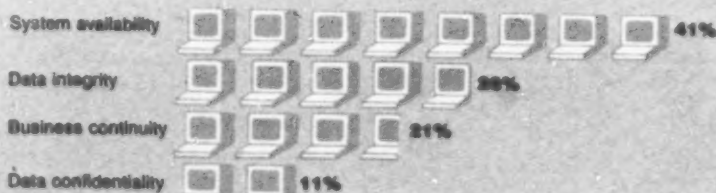
At least 40 percent of U.S. businesses may be unnecessarily vulnerable to business-stopping information systems breakdowns, according to the 1989 Ernst & Young Computer Security Survey.

The most widespread network security concerns are threats to computer applications, tampering or interference with the intended use of the network, and the inability to safely identify network users.

The survey asked 300 security professionals and general managers to share their security objectives for computer networks. System availability tops the list — 41 percent of respondents say that system availability and continuity of data processing service are the chief information security goals in their organizations.

Data integrity ranks as the second most common network security objective at 26 percent. Twenty-one percent of those surveyed say that business continuity is their chief network concern. And a surprisingly low percentage — 11 percent — say that loss of message integrity is their chief network security concern.

SECURITY OBJECTIVES FOR COMPUTER NETWORKS



Source: Ernst & Young

Continuity of data processing service is a chief information security goal.

NEWS

Security Wrap-Up: Prisons, Crime Shows, "Munching"

► Bureau of Justice statistics show that new prisons cost between \$50,000 and \$100,000 per bed space, but the costs of not building new prisons are even steeper. A year of crime by one offender is 17 times more expensive for society than a year in prison.

► The new crime-time TV shows such as "Unsolved Mysteries" and "America's Most Wanted" lead to the capture of hundreds of wanted fugitives. In addition to solving cases, the shows help to revive citizen cooperation with law enforcement and provide an outlet for citizens to voice frustrations about living with crime.

► Store employees who eat a bag of chips or drink a bottle of pop on the job without paying for it lead to significant inventory shrinkage, according to a Peter Berlin Retail Consulting Group survey. In two separate surveys within drug stores which average \$2 million in annual sales, cumulative personal consumption of food items ranged from \$1,674 to \$4,345 per year.

JANUARY 1990 / A CAHNERS PUBLICATION

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ISC-South
Feb. 15-17
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1990 Forecast: Budgets, Threats, Staffing and More!

Flexible Cure For Security Ills

Tough Interview Talk

BONUS REPORT on Sensors
and Detectors

Equipment Focus: Protecting
with High Security Padlocks



Jon Scolpino
Security Manager
Boehringer Ingelheim
Pharmaceuticals Inc.

SECURITY

THE MAGAZINE FOR SECURITY DECISION-MAKERS

A CAHNERS PUBLICATION/VOLUME 27, NUMBER 1/JANUARY 1990

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This SECURITY Magazine supplement covers all you need to know about protecting property and people by putting the right sensors in the right places.



The January cover story reveals what goes on behind a major pharmaceutical manufacturer's secure doors. (p. 38)

On the Cover

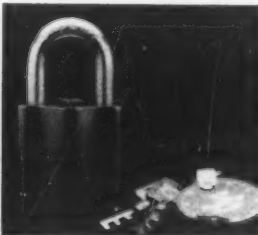
John Scolino, security manager, Boehringer Ingelheim Pharmaceuticals, Ridgefield, Conn., successfully tackles a variety of security tasks simultaneously. (p. 38)

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One key to security padlocks. The complete story in EQUIPMENT FOCUS. (p. 58)

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SECURITY (ISSN 0890-8826) is published monthly, except for March, June and September when two issues are published in national and separate editions, by The Cahners Publishing Company, A Division of Reed Publishing USA, 275 Washington St., Newton, MA 02158-1630. Terrence M. McDermott, President; Charles E. Moodhe, Senior Vice President/General Manager, Chicago Division; Jerry D. Neth, Senior Vice President/Publishing Operations; J.J. Walsh, Senior Vice President/Finance; Thomas J. Dellamaria, Senior Vice President/Production and Manufacturing; Ralph

Knupp, Vice President/Human Resources. Circulation records are maintained at Cahners Publishing Company, 44 Cook St., Denver, CO 80206-5800. Phone: 303/388-4511. Second-class postage paid at Denver, CO 80206-5800 and additional mailing offices. Postmaster: send address corrections to SECURITY at our Denver address. SECURITY copyright 1990 by Reed Publishing USA; Ronald G. Segel, Chairman and Chief Executive Officer; Robert L. Krakoff, President and Chief Operating Officer; William M. Platt, Senior Vice President. Annual subscription rates for non-qualified people: USA, \$59.95; Canada/Mexico, \$89.95; other countries, \$115 for surface mail and \$165 for air mail. Special issues, including product directory, are \$50. Except for special issues where price changes are indicated, single copies of regular issues are available for \$10, \$14 and \$18 (USA, Canada/Mexico and foreign). Please address all subscription mail to SECURITY, 44 Cook St., Denver, CO 80206-5800.

SECURITY INDICATORS

Trends and forecasts for determining loss prevention needs.

SECURITY SURVEY

Liability Issues Lead To Growing Concern

Nearly one in three security decision makers — 31 percent — say that liability is a problem for their security department and employer. Respondents in retail report the highest liability concern at 54 percent, says SECURITY Magazine's Fourth Quarterly Telephone Survey.

Eleven percent of security decision makers surveyed say they have been named in a liability action within the past 12 months; 27 percent who work for the government say this.

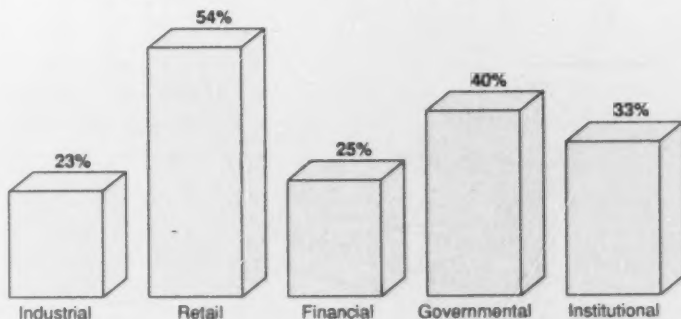
SECURITY's Fourth Quarterly Telephone Survey also reveals that organizations that employ security decision makers are more likely to offer an employee assistance program for drug and alcohol abuse and psychological counseling.

Of respondents, 99 percent say their organizations offer employee assistance programs for alcohol and drug abuse. An additional 96 percent say that their organizations offer psychological counseling.

Nationally, employee assistance programs are fewer and farther between. Of the 84.9 million American workers in private, non-agricultural jobs in 1988, only 31 percent worked for a

LIABILITY: A COMMON CONCERN

Those who say liability is a problem for their security department and employer



Source: SECURITY Magazine

Liability is an issue for almost one in three security departments.

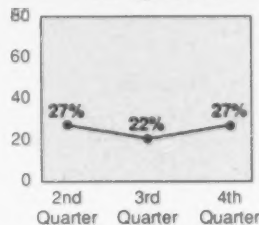
company that offered an assistance program. The figures are promising, however. The number of assistance programs has tripled in five years.

SECURITY Magazine's quarterly tracking question, "Has the number of security incidents increased, decreased or remained the same over the past three months?" shows that retail leads the way in security incidents in the third quarter.

While an average 27 percent of respondents report an increase in security incidents, retail is much higher at 46 percent. And, 18 percent of respondents report an incident decrease.

TRACKING SECURITY INCIDENTS

Average percentage reporting an increase in security incidents

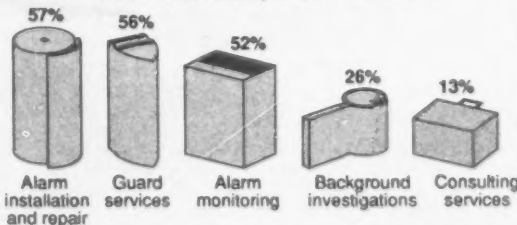


Source: SECURITY Magazine

SECURITY's Fourth Quarterly Survey shows an increase in incidents.

OUTSIDE FIRMS EARN SECURITY'S BUSINESS

Contract services security decision makers use



Source: SECURITY Magazine

Contract services continue to attract security's business into the new decade — especially alarm installation services.

1990 FORECAST STUDY

Contract Services Going Strong Into the 1990s

The SECURITY Magazine 1990 Forecast Study reveals that security decision makers are increasingly taking advantage of security-related contract services — especially alarm installation, maintenance and repair services — to keep security running at full speed.

Among respondents, 57 percent contract for alarm services with an outside firm. Guard services are also popular; 56 percent say they contract for this service.

Other services in demand are armored couriers, substance abuse testing, background investigations, disaster planning and recovery, and consulting services. For detailed coverage of 1990 Forecast Study results, see "Charting Security's Course" elsewhere in this issue.

SAFETY AND ETHICS

Corporate Performance Goals Deviate Among Constituencies

Hands down, safe working conditions take priority among employees — and employees only.

So says a survey conducted by Sirota, Alper & Pfau, New York, which surveyed employees, mayors and investors nationwide. Employees' job safety is more important than good pay, job security and fair workload. Although money is a consideration, workers are more concerned with the safety of the buildings and equipment they use.

"A surprising number of workers already see their employers doing something about safety, but they want to see employers do more," says Joseph Kinney, executive director, National Safe Workplace Institute, Chicago. "More than 98 percent of workers believe the government should be spending as



Safety on the job tops employees' priorities; good pay and training lag.

much on job safety as on environmental protection."

While safe working conditions ranked first among employees, it isn't a consideration for mayors and investors. Ethical corporate behavior is the most important corporate performance

goal for 71 percent of mayors. And competent top management was the top goal for 44 percent of investors.

Regardless of differences in priorities, ethical corporate behavior, honest communication and competent top management score high among all.

NEWS

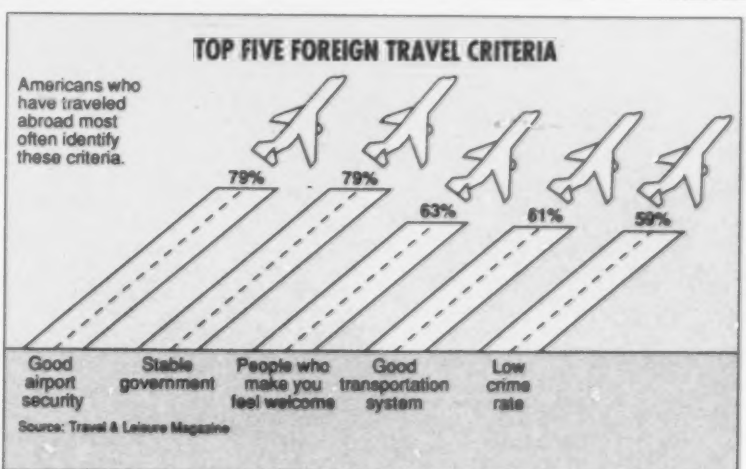
Security Wrap-Up: Ethics, Fraud, Teens, Campus Crime

► Ethics compliance is emerging as an area of security involvement, says the 1990 SECURITY Forecast Study. When asked to respond to the statement, "Ethics compliance is a security task," respondents averaged a score of 3.4 on a scale of 0 to 5, with 5 denoting strongest agreement.

► A growing credit card fraud threat: a more sophisticated thief who files fraudulent credit card applications with a smattering of legitimate information. In many cases, that information is obtained by criminals who take jobs as janitors or security officers in order to steal personnel records.

► The national decline in the teenage population is having a reverse effect on the rate of teenage shoplifters. While the overall teenage population is down, the percentage of teenage shoplifters is up, according to a recent survey. This, along with drugs, helps explain the nation's 33 percent rise in shoplifting since 1986.

► Property and violent crimes on college campuses decreased in 1989, according to FBI statistics. Property crime declined almost 4 percent, and violent crime decreased just over 10 percent. The number of incidents per 1,000 students ranged from five at Macomb Community College, Mich., to 68 at the University of Calif., Davis. The push for increased campus security may attribute to incident decreases.



Dependable airport security is more important to flyers than tourist attractions.

TERRORISM

Airport Security Hovers Above Other Travel Concerns

One out of 10 Americans who have traveled abroad — approximately 1.8 million Americans — have cancelled a foreign trip because of a terrorist concern. So says the 1989 Travel and Leisure Study of Americans who traveled in the last year.

The study reports that while travelers are looking for new experiences and excitement, they are also very concerned about security. These elevated security concerns demonstrate the long-term impact of terrorism on foreign travel,

the survey says.

Americans who have traveled abroad or who say they soon plan to do so place security and safety concerns highest among their travel criteria. The majority — 79 percent — say good airport security is very important when choosing foreign destinations.

Good airport security tops a list of 19 considerations that include friendly culture, favorable exchange rate and famous sites to visit.

A stable government is also important to 79 percent of respondents. And low crime rate ranked in the top five considerations, with 59 percent saying it's important when choosing a foreign destination. Just 10 percent say they would travel around the world.

CHARTING SECURITY'S COURSE

*Map out your programs,
staffing, budget and purchases.*

*By Bill Zalud
Editor*

Welcome to 1990! This year will include: A little less budget, a little more business stability. More equipment to upgrade current gear and cover expansions. More outside services to hold down inside staff with substance abuse's resource-eating appetite continuing to grow.

According to an exclusive SECURITY survey of America's security operations, 1990 holds promise and challenges.

• **BUDGETS:** Growth will lag inflation more than last year. But more operations have increased budgets, with new dollars for equipment rather than personnel.

• **PRODUCTS, SERVICES:** Increased security dollars will go to CCTV, access control and contract officers.

• **STAFFING:** Security employee numbers continue relatively stable at 11 per organization, on the average.

Strategy: Surviving Business Change

"This is an era of leveraged buy outs, mergers, acquisitions, reorganizations and downsizing," says Daniel L. King, director of loss prevention, Marriott Corp., Washington, D.C. Such developments will continue to impact security.

"The key to survival is adaptation," advises King. His successful strategy: become a generalist. "Security must be skillful in multiple disciplines. You must be operationally driven."

Security needs a better understanding of how loss prevention and security relate to traditional corporate disciplines such as operations, finance, legal, human resources and marketing.

Going beyond mere teamwork, such a macro perspective allows security to leverage benefits and market results to others within the organization — even when a company faces major changes in ownership or direction. Making and using allies is a key.

THREATS AND RESPONSES

Substance abuse has eclipsed other, traditional concerns.

Almost 55 percent of security decision makers feel this was the biggest security concern last year, while 51 percent believe property crime was. These two threats are both more than double others, including white collar and violent crime.

Liability took the biggest tumble, from third to fifth. At the low end, product tampering and arson also fell.

New to SECURITY's Forecast, ethics placed midway in a list of 12 concerns, with about 19 percent labeling it the biggest headache.

Neighborhood Crime Impact

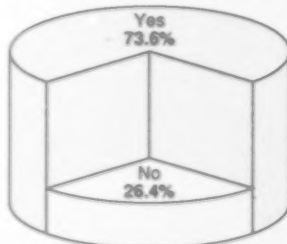
Experts link vicinity crime and the workplace. Tracking this linkage since 1980, there's increased impact of crime in the workplace.

Of three traditional threats — property, white collar and violent crime — property crime is most widespread in the vicinity of the company.

However, when comparing vicinity crime growth in 1989 to 1980, white collar and violent crime increased slightly while property crime stalled — indicating an escalation of threats.

More linkage? While a vast majority of security decision makers agree employees are safe and secure to and from work, less agree now than in 1980.

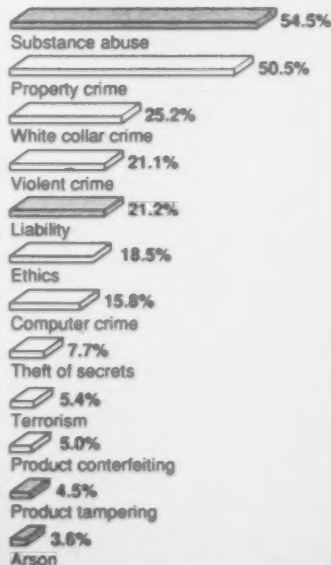
Do Business Developments Impact Security?



Nearly three out of every four security decision makers feel business developments impact the operation.

Source: SECURITY

Biggest Security Concerns in 1989

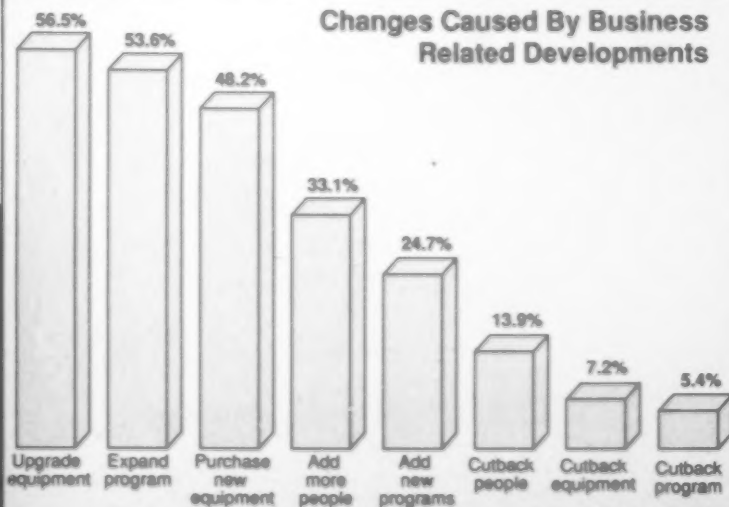


On rise On decline

Substance abuse moved to the top spot of major security concerns in 1989. Total equals more than 100% due to multiple answers.

Source: SECURITY

Changes Caused By Business Related Developments



Adding to current equipment and programs are the two top ways security adapts to business-related developments. Total equals more than 100% due to multiple answers.

Source: SECURITY

Investment Ups and Downs

Such challenges demand a security investment and top management support. Here, there's good and bad news.

The good news: Most security decision makers strongly agree their organization's investment in security has increased over 1980. Most agree that employees are safe at work too.

The bad news: Top management support is slipping. While support exists, it continues to drift progressively downward when compared to 1980. There's slip-page in safety too: security's less sure it can meet future safety needs.

STATE OF THE ORGANIZATION

Still reeling from a decade of change, business has settled down — but down to leaner, more constant downsizing. Nearly three of four security operations felt the impact of business developments.

Yet contradictions abound.

Expansion is strong and continuing — almost 60 percent added or expanded a facility. There's a drop in layoffs and plant/office closings.

But acquisitions, reorganizations and mergers, compared to 1989, continue. The second most cited development, almost 39 percent just completed such a process, and it affected the security effort in some way.

Business Alters Security

These business developments can make spending go up or down. Improvements are most often cited ranging from upgrading equipment to starting a new program. Least mentioned are fall-backs: cutting back people and programs.

SECURITY BUDGETS

Budget growth in 1990 will lag inflation more than last year. Yet more security operations report increases.

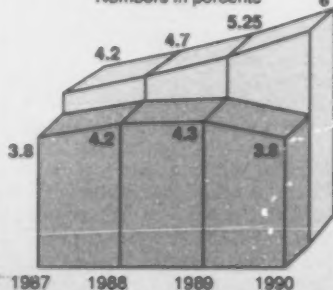
There is a projected 1990 security budget increase of 3.8 percent over 1989. This compares with a projected 1989 increase of 4.3 percent over 1988. On the average, the 1989 security budget was \$423,571.

Budgets Settle Down

More budgets will stabilize or increase in 1990. Just over nine of 10 security operations report their budget will grow or remain the same. Even better, 42 percent report an increase, compared to 35 percent in 1989. The gap between budget

Projected Annual Budget Increase

Numbers in percents



■ Budget Increase □ Inflation (est.)

Continually lagging inflation, security still projects a budget increase in 1990.

Source: SECURITY

Size Of Security Budget 1989

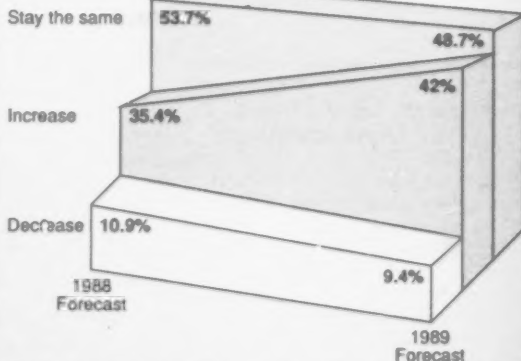
In thousands of dollars

Less than \$25	21.9%
\$25 - \$50	8.9%
\$51 - \$100	12.9%
\$101 - \$250	16.5%
\$251 - \$500	11.6%
\$501 - \$750	5.3%
\$751 - \$1M	5.4%
More than \$ 1M	16.5%
Average	\$423,571

Six out of 10 security operations have a budget under \$500,000.

Source: SECURITY

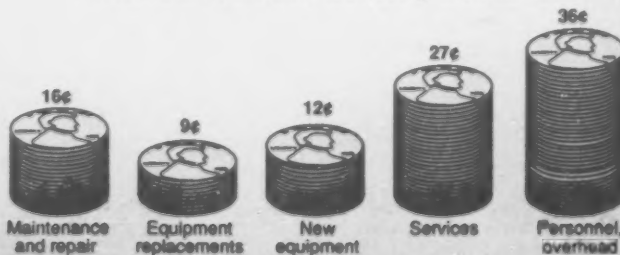
Budget Change For 1990



Security budgets are more bullish for 1990, but total dollar growth is less than 1989 projections.

Source: SECURITY

Where Does Each Security Dollar Go?



There's no noticeable change in distribution of security dollars from 1988 to 1989.

Source: SECURITY

Money Available outside security budget

increase and inflation hurts. Security disagrees when asked if there is adequate budget compared to 1980.

About one in every 10 operations faces more bad news — a projected decrease in security budget in 1990.

Budget represents a spending plan divided consistently into five relatively unchanging categories, with personnel getting the lion's share.

When projecting budget distribution in 1990, security will spend more on new equipment than personnel — a reversal driven by automation and downsizing.

Size Dictates Spendables

Three spendables — personnel, services and maintenance/repair — relate uniquely to budget size.

Overall, personnel costs go up more sharply as total budget increases. For example, if the security budget is less than \$25,000, personnel costs are about 25 cents of each dollar. When the budget is \$750,000 or larger, half (50 cents) goes for personnel and overhead.

Just the opposite happens in repair and maintenance. The bigger the budget, the less spent. With budget less than \$25,000,

Strategy: Distribution And Downsizing

"Networks, advanced microprocessors and more powerful PC operating systems are technological legacies of the 1980s," points out John Moss, president, Software House.

"These advances will set the pace for new products in the 1990s," leading to higher levels of integration, says Moss.

Two factors push integration: users want the best products no matter the manufacturer and want to upgrade capability without scrapping their original investment. "The best approach," points out Moss, "is development on two fronts: large distributed networks that reduce operating costs by centralizing administration and security control for multiple sites and downsizing of integration to run on PC-sized systems."

Moss predicts that security decision makers in the 1990s will increase their demand for systems that integrate card access, alarm monitoring, CCTV control, biometrics and administrative tasks.

maintenance is about 29 cents of every dollar. When budget is \$750,000 or larger, only 9.2 cents of every dollar goes for maintenance.

Services are another kettle of fish.

Middle-sized operations find contract services most attractive. When the security budget is mid-level (\$100,001 to \$250,000), about 40 cents of each dollar goes to services. At low and high ends of budget, service spending is pegged at about 22 cents.

OUTSIDE MONEY

Money outside the traditional security budget is increasing.

These additional dollars play a role in security's ability to hold the line and improve. Yet spending is spread over budgets controlled by others.

Most Have Extra Money

About 65 percent say there's money for security outside the traditional security budget — a remarkable 10 percent increase over last year.

On the average, these "outside the security budget dollars" amount to about \$44,106. Most come from the capital equipment budget in 1990. Biggest growth capital equipment, parking/grounds and human resources.

PRODUCTS, SERVICES

In 1989, new products and contracted services received about 39 cents of every security dollar, plus a bit more from outside the budget.

While spread across a diversity of needs, top products were locks, access control, CCTV and security lighting.

Product Basics for 1990

This year, "bread and butter" equipment — CCTV and access controls — gets most attention.

There's also solid interest in locks, indoor intrusion detection, outdoor perimeter protection and integrated systems, with less interest in radio communications, personal identification and fire protection, possibly because of their already high use.

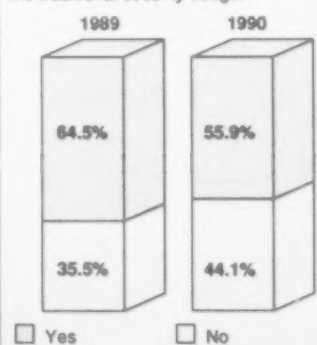
Emerging Technologies

Security down plays technology dazzle. It favors products and services already emerged — solid state CCTV, drug testing, personal computer security and quads — over those just introduced.

Yet there's experimentation from such emerging technologies as remote-monitored access control, fiber optics,

Money From Outside Security Budget

Is money for security available outside the traditional security budget?



A trend shows increasing money for security from outside the security budget.
Source: SECURITY

color CCTV, downloading digital communicators and biometrics. Whether new or old, equipment must be easy to use and work properly.

A Little Harder to Operate

Security strongly agrees that products are easy to use. Yet there's concern that equipment is getting a little harder to operate because of increased sophistication, labor market changes and system integration.

In addition, security agrees that false alarms are a problem but one that has leveled off.

Service Needs Bolstered

On the contract service side, more than half of security decision makers went outside in 1989 for alarm installation and repair, security officers and alarm monitoring.

Fastest growth last year: substance abuse help, security couriers, disaster planning and contract guards.

In 1990, a majority will seek outside help for alarm installation and maintenance. Four of 10 will contract for outside alarm monitoring. Two of 10 will contract for couriers, substance abuse help, access control, background investigations, pre-employment screening, investigations and off-site records storage. And one of 10 will contract for disaster planning help and security-related consultants.

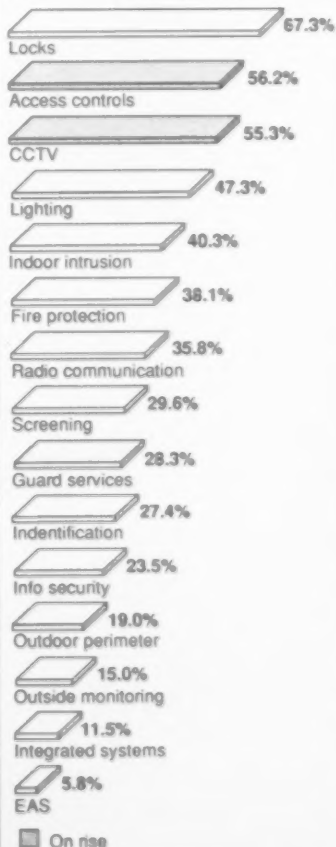
SECURITY STAFF

The number of security employees remained relatively stable in 1989, at about 11 employees per security department, on the average.

About 17

percent of operations are one or two person shops, while 70 percent have 29 or fewer security employees. Yet there is plenty of action at the other end. About 11 percent manage a security workforce of over 100 people.

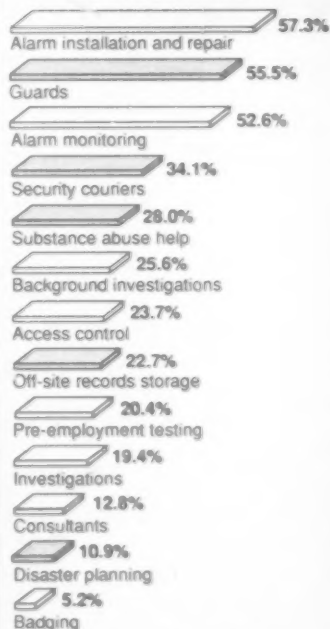
Product, Services Purchased Last 12 Months



CCTV, access control and guard services are projected to be biggest purchases in 1990 from a diversity of products and services in 1989.

Source: SECURITY

Contracted Outside Services In 1990

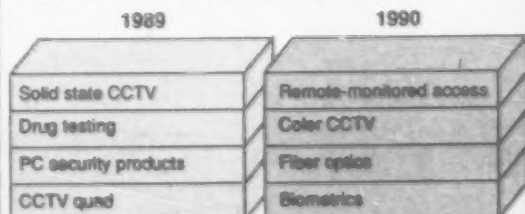


The breakdown of contract service use remained fairly constant 1989 to 1990.

Source: SECURITY

New Technology Takes Hold

What emerging technologies show biggest gain in 1989 and 1990?



Attractive emerging technologies include tools that improve identification and productivity.

Source: SECURITY

Staff Slide Stops

During the 1980s, security staff — on the average — decreased. There are signs, however, that pressure to constantly decrease staff has bottomed out. For example, fewer departments in 1990 plan to decrease staff (6 percent compared to 17 percent in 1989) while figures remain constant for those increasing or stabilizing staff levels.

This year, staff will increase most often when the security investment is up, the security budget is \$250,001 to \$750,000 and in the retail/wholesale arena. Staff decreases will happen when business is down, security investment is down and the security budget is \$750,000 or over.

TRAINING, AWARENESS

Of all issues, staff training and employee awareness programs show the steadiest upward growth since 1987.

On the training side, most security competence comes from on-the-job training. Yet more than half of all security operations (53 percent) have a formal training program. Strongest growth: films/videos.

About 14 percent provide no training. One explanation: most "no training" operations are one or two person shops.

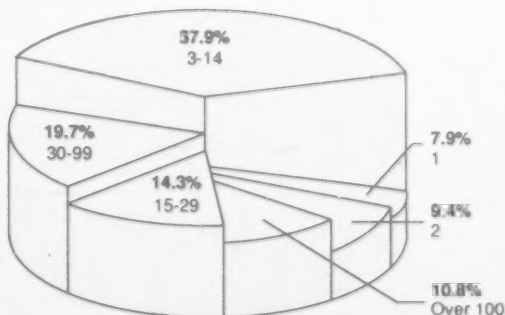
On the awareness side, about three of four security decision makers use personal contacts and memos to get the word out. About 69 percent of organizations conduct some form of new employee orientation that includes security awareness messages. And more than half of security operations use information meetings, security patrols and an open door policy.

PROFILE OF RESPONDENTS

A four-page questionnaire was mailed to 1,000 security decision makers, randomly sampled from the field's largest data base of security executives — SECURITY readers. Excluded were alarm dealers, alarm installers, security distributors, security consultants and engineers. More than 28 percent response was received.

Results reflect respondents distributed across a diverse profile of organizations.

Security Employees Per Organization



*Average per organization: 11 employees (1988 and 1989)

There's no change in average number of security employees per organization, although the trend continues slightly downward.

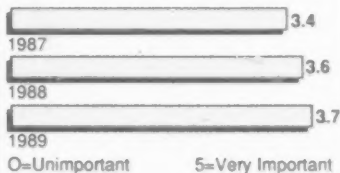
Source: SECURITY

This 1990

Forecast Study is part of the SECURITY DATA BANK — continuing, exclusive and useful studies of decision making, spending and planning. An executive summary and complete tabulations of this and other SECURITY DATA BANK reports are available. Circle 155 on your reader service card for further details.

Importance Of Training, Security Awareness

Security decision makers rank importance of training and security awareness with 5 being very important



Security decision makers indicate a growing need for better training of staff and more security awareness programs.

Source: SECURITY

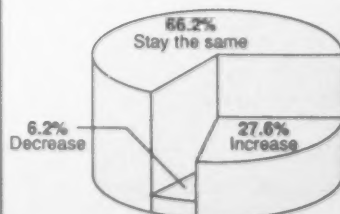
Strategy: More Payback

"Certainly CCTV and electrical-mechanical access control systems are the cornerstone for spending this year," points out George S. Brody, vice president of marketing at Burle Industries' Security Products division. "Computer and communication technologies drive more products and systems."

Specific to the CCTV market, Brody believes:

- Solid state CCD will continue as a popular emerging technology;
- Color CCTV equipment "will take off in 1990 with improvements in sensitivity and value"; and
- Rapidly changing technologies and shorter product life cycles will spur essential continuous development.

Staffing Changes For Next Year



Security decision makers predict the slight decrease in staff numbers has bottomed out, with some new growth.

Source: SECURITY

FEBRUARY 1990

A CAHNER PUBLICATION

SECURITY

THE MAGAZINE FOR SECURITY DECISION MAKERS

Complete
Info on
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Los Angeles
Inside!

Security Goes Downtown

Managing Liability
Without Hysteria

Equipment Focus:
Using Barricades

Chuck Rangel

Director of Security
Houston Police



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THE MAGAZINE FOR SECURITY DECISION MAKERS

A CAHNERS PUBLICATION/VOLUME 27, NUMBER 2/FEBRUARY 1990

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and use the handy,
objective
comparison chart.



Barricades are security's
business. (p. 42).

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ized Consumer Magazines: American Baby ☐ Modern Bride
SECURITY (ISSN 0890-8826) is published monthly, except for
March, June and September when two issues are published in na-
tional and separate editions, by The Cahners Publishing Company,
A Division of Reed Publishing USA, 275 Washington St., Newton,
MA 02158-1630. Terrence M. McDermott, President; Charles E.
Moodhe, Senior Vice President/General Manager, Chicago Divi-
sion; Jerry D. Neth, Senior Vice President/Publishing Operations;
J.J. Walsh, Senior Vice President/Finance, Thomas J. Dellamaria,
Senior Vice President/Production and Manufacturing; Ralph

Knapp, Vice President/Human Resources. Circulation records are
maintained at Cahners Publishing Company, 44 Cook St., Denver,
CO 80206-5800. Phone: 303/388-4511. Second-class postage paid
at Denver, CO 80206-5800 and additional mailing offices. Postmas-
ter: send address corrections to SECURITY at our Denver address.
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President and Chief Operating Officer; William M. Platt, Senior
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USA, \$59.95; Canada/Mexico, \$89.95; other countries, \$115 for
surface mail and \$165 for air mail. Special issues, including product
directory, are \$50. Except for special issues where price changes are
indicated, single copies of regular issues are available for \$10, \$14
and \$18 (USA, Canada/Mexico and foreign). Please address all sub-
scription mail to SECURITY, 44 Cook St., Denver, CO 80206-5800.

SECURITY INDICATORS

Trends and forecasts for determining loss prevention needs.

SECURITY EMPLOYMENT

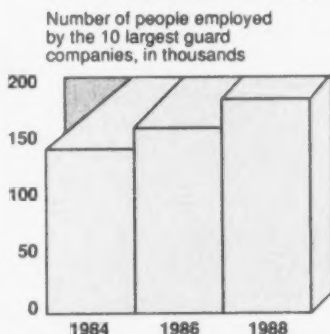
Revenues Soar With Contract Growth

Security officers account for an increasing percentage of the work force as crime prevention concerns mount, according to Department of Labor statistics. Security officers now account for at least 1.6 percent of all working Americans, twice the percentage officers represented in 1970.

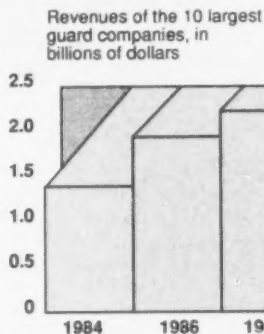
Officer employment is up 35 percent since 1984, according to *Security Letter*. About 140,000 officers were employed by the 10 largest guard companies in 1984; close to 200,000 were employed by these companies in 1988. *Security Letter* publisher Robert McCrie says the impressive growth in the 1980s pales in comparison with the industry's dramatic growth in the 1970s. He speculates continued steady, yet modest, growth for the 1990s.

The increasing number of officers has had a positive effect on the nation's unemployment rate; economists say it might be a quarter of a percent higher

REVENUES RISE AS OFFICER EMPLOYMENT SOARS



Source: *Security Letter*



The number of people employed by the 10 largest guard companies grew 35 percent between 1984 and 1988; company revenues grew 62 percent during that same period.

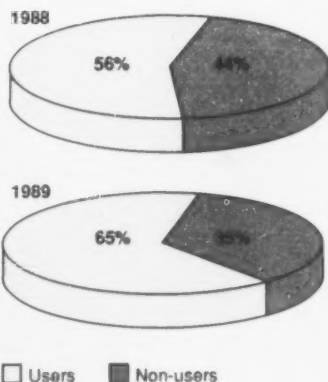
if the officers were not employed. In contrast, state and local police forces grew only slightly in the 1980s.

The growing officer population also positively affects profits for the 10 guard companies with the highest total revenues. Revenues rose 62 percent between 1984 and 1988, jumping from

\$1.5 billion to almost \$2.5 billion.

Minimum wage increases will also affect guard company revenues, McCrie says. "The higher minimum wage is good news because inflationary factors will increase all officer wages. Guard companies will respond by raising client rates," he says.

SECURITY'S COMPUTER USE GROWS



Source: SECURITY

Security's use of computers grew 9 percent between 1988 and 1989; electronic mail use played a part.

COMPUTERS

Security's Computer Use, Applications Grow

Security is buying and using computers at an accelerated rate, according to SECURITY Magazine's 1990 Forecast Study.

Of respondents, 65 percent use computers to help with operations, recordkeeping and decision making. For the 1989 Forecast Study, that figure was 56 percent.

Security budget and an organization's total number of employees determine who can afford computers. Of respondents with security budgets between \$250,001 and \$750,000, 90 percent use computers; 51 percent of respondents with budgets between \$25,001 and \$100,000 use computers.

When it comes to personnel, the higher the number of total employees, the greater the chance security is using computers. Among respondents who

work for companies

that employ at least 1,000 people, 79 percent use computers while providing security. Of organizations that employ between 50 and 249 people, 41 percent use computers for the security department.

Service industries most likely provide computers for security, the study says.

Recordkeeping is the most common task among 85 percent of computer users. An additional 60 percent use computers for correspondence, 49 percent monitor or control security systems, 40 percent use electronic mail or fax capabilities, 21 percent maintain external databases and 20 percent use computers to help with security decision making.

Slightly more than one in four respondents plan to add computers in the next year. That's an increase from 1989 when just 18 percent planned a computer purchase.



INTERNAL THEFT

Time Theft: The Most Common Employee Crime

Employees steal time more than they steal office equipment or supplies, says a study of 942 human resource professionals conducted by Adia Personnel Services, Menlo Park, Calif.

Two thirds of respondents say time theft — long lunch breaks, leaving work early and excessive socializing — is the most serious employee dishonesty issue. The problem is most serious in the banking, insurance, real estate and transportation industries, where 72 percent of respondents report time theft. About 4 percent of banking and insurance respondents say employee theft by electronic funds transfer has also been a major problem in the last year.

Unauthorized long distance telephone calls present the second most serious employee dishonesty issue for 32 percent of respondents. Phone abuse is highest in medical and professional service industries, where 42 percent say it's a problem.

Theft of work supplies and equip-

TIME THEFT: THE MOST COMMON EMPLOYEE CRIME

Time Theft



Unauthorized long distance calls



Work supply and equipment theft



Inventory theft



Source: Adia Personnel Services

Employee dishonesty means more than stolen office equipment and inventory. Time theft — lengthy lunch breaks and socializing — is one of the most serious concerns.

ment was a problem — although not as notable as time theft — for 30 percent of respondents. Missing inventory concerns 15 percent. Inventory theft is more serious in retailing, however, where one in four companies says missing inventory is a serious concern.

Employee dishonesty costs 37 percent of respondents at least \$10,000 per year. Computer and electronics firms are the most affected; 12 percent say that they lost more than \$100,000 to employee dishonesty in the last year.

LOSS PREVENTION

High-Shrink Retailers Spend Big on Guards, Detectives

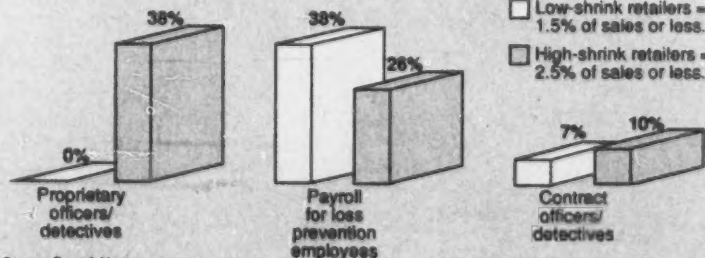
Retailers with shrinkage figures approaching 2.5 percent of sales spend 74 percent of loss prevention budgets on proprietary and contracted guards and loss prevention employees, says a recent Ernst & Young survey.

The Eleventh Annual Survey of Security and Loss Prevention in the Retail Industry profiles low-shrink retailers whose shrinkage totals 1.5 percent of sales or less and high-shrink retailers with shrinkage at 2.5 percent of sales

or less. In general, low-shrink stores report lower sales volume than high-shrink companies. The findings reveal low-shrink establishments spending more money on electronic article surveillance and high-shrink retailers spending more on personnel.

Low-shrink department store retailers allocated 44 percent of funds to EAS equipment, compared to only 5 percent for the high-shrink companies. And while high-shrink retailers spent 38 percent of budgets on proprietary guards and detectives, low-shrinkage counterparts did not invest in them. Low-shrink retailers do spend more for loss prevention employees, however: 38 percent vs. 26 percent.

DEPARTMENT STORE LOSS PREVENTION EXPENSE ALLOCATION



Overall, high-shrink stores spend more on officers and loss prevention employees.

NEWS

Security Wrap-Up: Forgery, Employment, Screening

► The black market for alien certification is forcing the Immigration and Naturalization Service to change its so-called green card — which hasn't been green for years — to an off-pink card printed in a special ink to help combat forgeries. The going rate for a forged card is \$5,000 to \$10,000, with some aliens paying as much as \$20,000.

► Computer security opportunities are growing rapidly. The field did not exist 15 years ago because there wasn't a demand to safeguard computer systems. Today, there are about 10,000 computer security experts, and the number grows by about 25 percent each year.

► Computerized pre-employment interviews, used with face-to-face interviews, may give a more complete and honest profile of job candidates. Developed by Richard Phannenstill, a veteran polygraphist, a new screening tool is designed to make evasion of answers more difficult. People tend to be more honest when interacting with a computer than with people, he says. The program asks questions about job and driving records, theft and other crimes and drug and alcohol use.

SERVICES

A guide to selecting and staying informed on security services.

Changing Times for Contract Officer Pay

By Rebecca D. Russell
Senior Editor

As America begins the first of two minimum wage increases in April, some security decision makers may re-evaluate contract officer pay.

A recent SECURITY DATA BANK survey shows that overall pay for contract officers is above minimum wage. Yet with so visible a pay raise, there's pressure for copycat raises.

Minimum wage increases from \$3.35 an hour to \$3.80 in April, then to \$4.25 in April 1991. Executives at three leading contract officer organizations anticipate little impact.

Alan Bernstein, Wackenhut senior vice president of domestic operations, anticipates, instead, that more people will earn closer to minimum wage.

BENEFITS AS PART OF SALARY

Organizations offering benefits to contract officers



29% Don't know what benefits are provided by contractor

Source: SECURITY Magazine

More businesses pay for contract officer benefits, yet nearly one-third don't know what they are paying for.

Vince Papi, vice president of marketing, Allied Security Inc., says across-the-board increases will depend on user budgets and flexibility.

And CPP Pinkerton's Kevin O'Connor, vice president of national accounts, says changes will have the greatest affect regionally, but clients will have difficulty maintaining the spread of difference, thanks to competition.

That "spread" is evident in SECURITY's telephone survey.

• Among industrial organizations, average salary is \$7.39 per hour. Most security decision makers in this sector pay between \$6 and \$6.99 per hour.

While overall contract officer pay is above minimum wage, mandatory increases will cut into the salary spread.

- For financial organizations, most report wages between \$7 and \$7.99 per hour. Average here is \$8.37 per hour.
- Retail pay is spread evenly among \$8, \$9 and \$11 an hour; average is \$8.91.
- In the institutional sector, most report wages between \$9 and \$10.99 per hour, for an average \$9.21 per hour.
- The government sector pays highest, as most report wages more than \$11. The average salary is \$15.10.

Compensation Dilemma

Salary varies by industry and geographic region.

Determining salary requires a look at several factors. It's wise to first outline security officer responsibilities. A night officer watching an empty warehouse may receive different pay than an officer in the main reception area. Also look at pay for comparable work among people within your organization and the surrounding community. And be sure to compare vendors. What your organization pays officers will affect the service you get.

Beyond Wages

In addition to salary, there are also benefits — who pays what. Of DATA BANK respondents, 47 percent offer benefits through the contractor and 53

WHAT SECURITY PAYS ITS CONTRACT OFFICERS

Average hourly pay by type of business



Source: SECURITY Magazine

Government sector officers earn well above minimum wage, boosting the overall average pay for contract officers.

percent do not. These benefits range from uniforms and laundry service to medical, dental, life insurance, retirement plan, paid vacations, holidays and sick days. Yet nearly one-third of security decision makers do not know what benefits the contractor offers.

Vendors concur that more organizations include benefits in pay.

"You have to attract the labor," says O'Connor. He says officers look harder for organizations that offer benefits, particularly health care.

Bernstein says by offering benefits an organization presents a better image. "By providing benefits, it takes officers out of the realm of minimum wage workers."

Papi says benefits reflect a company's attitude about quality. "It's the only way the end-user has of telling us they want quality," he says.

With the increase in minimum wage, the price to get more than a body in a contract officer uniform will most likely be going up, one way or another.

SECURITY^{T.M.}

THE MAGAZINE FOR SECURITY DECISION MAKERS

Prepared For Disaster

Securing America's Traffic

Wireless Gains Ground

Equipment Focus:

Fire Extinguisher Basics



Art Brubaker

Supervisor of Security and Safety
Owens-Corning Fiberglas Corp.

SECURITY

THE MAGAZINE FOR SECURITY DECISION-MAKERS

A CAHNERS PUBLICATION/VOLUME 27, NUMBER 3/MARCH 1990

DEPARTMENTS

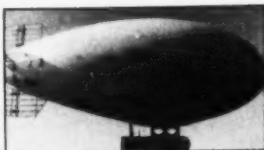
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No, it's not the return of the Hindenburg. (p. 20)

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DISASTER! READY OR NOT?

Disaster drills prepare security and safety teams. Find out how one security decision maker got ready for a drill as he tells his story, step-by-step.



A disaster drill offers valuable training experience. (p. 42)

47 SECURE TRANSPORT FROM HERE TO THERE

How security protects people and cargo in transit is as varied as the methods of transport. Learn what's ahead and how to gain from this industry's experience.

54 PRISON BUSINESS

Prisons are big business, as private security concepts and products break into corrections.

On the Cover

Arthur F. Brubaker, supervisor of security and safety, Owens-Corning Fiberglas, Toledo, Ohio, manages a disaster drill for a high-rise office complex. (p. 40)

SERVICES

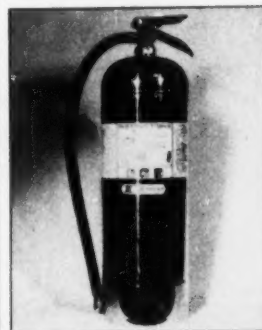
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Wireless alarms come of age thanks to better technology and acceptance.

EQUIPMENT FOCUS

62 Portable Extinguishers and Know-How Wipe Out Fires Before They Flourish

Portable fire extinguishers of all sizes and capacities are security tools for fire-fighting duties.



Portable extinguishers are read and waiting. (p. 62)

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SECURITY (ISSN 0890-8826) is published monthly, except for March, June and September when two issues are published in national and separate editions, by The Cahners Publishing Company, A Division of Reed Publishing USA, 275 Washington St., Newton, MA 02158-1630. Terrence M. McDermott, President; Charles E. Moodhe, Senior Vice President/General Manager, Chicago Division; Jerry D. Neth, Senior Vice President/Publishing Operations; J.J. Walsh, Senior Vice President/Finance; Thomas J. Dellamaria, Senior Vice President/Production and Manufacturing; Ralph

Knapp, Vice President/Human Resources. Circulation records are maintained at Cahners Publishing Company, 44 Cook St., Denver, CO 80206-5800. Phone: 303/388-4511. Second-class postage paid at Denver, CO 80206-5800 and additional mailing offices. Postmaster: send address corrections to **SECURITY** at our Denver address. **SECURITY** copyright 1990 by Reed Publishing USA; Ronald G. Segel, Chairman and Chief Executive Officer; Robert L. Krakoff, President and Chief Operating Officer; William M. Platt, Senior Vice President. Annual subscription rates for non-qualified people: USA, \$59.95; Canada/Mexico, \$89.95; other countries, \$115 for surface mail and \$165 for air mail. Special issues, including product directory, are \$50. Except for special issues where price changes are indicated, single copies of regular issues are available for \$10, \$14 and \$18 (USA, Canada/Mexico and foreign). Please address all subscription mail to **SECURITY**, 44 Cook St., Denver, CO 80206-5800.

SECURITY INDICATORS

Trends and forecasts for determining loss prevention needs.

COMMERCIAL LEASING

Security One Top Leasing Factor for Prospective Business Tenants

Security services rank with location, rental rates and parking as a top office space leasing consideration, says a United Security Industries Survey.

The survey reveals that 25 percent of building owners, on-site managers and property management personnel rank security as first or second in importance in commercial property marketing programs. As a tenant relations tool, respondents place security first, second or third in importance.

Security is emerging as a building design consideration as well. Of respondents, 68 percent say that security systems that fulfill electronic and staff needs are part of the original design of the buildings under construction that they represent.

Security expenses increase as security's importance intensifies. Sixty-eight percent say they spent more on security services per rentable square foot in 1988 than in 1987, with the average increase at almost 12 percent.

Spending on security increased more dramatically between 1985 and 1988; 90 percent spent more on security in 1988 than in 1985, with an average increase nearing 28 percent.

If commercial property managers are looking to keep costs down, they are likely to look to contract security services rather than hire in-house. Contract services are perceived as less expensive than proprietary services by nearly three of four respondents. Just 29 percent say in-house security services are less expensive.

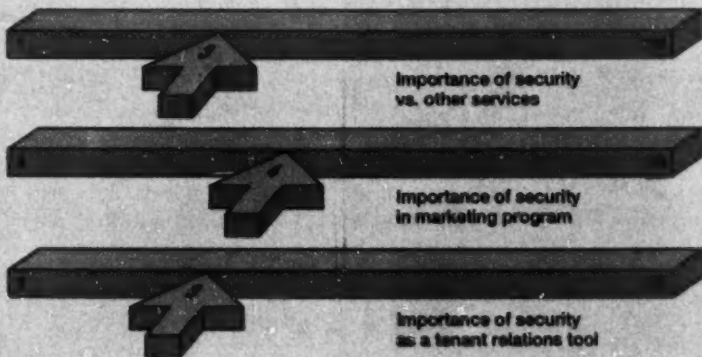
A changing quality of personnel is the factor most likely to motivate more than 50 percent of commercial property managers to review their current security services. Theft ranks as the second cause for review at 19 percent. Cost ranks third; 14 percent of respondents say a price increase would prompt a review of current security services. High security personnel turnover would also trigger a review, the managers say.

SECURITY: A MAJOR LEASING FACTOR

According to building owners, on-site managers and property management

Most important

Least important

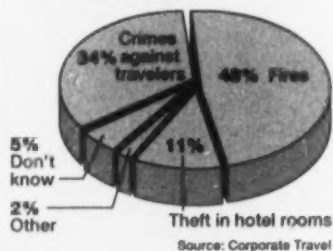


Source: United Security Industries

Building owners say security services help attract commercial tenants. Security now ranks with location, parking and rental rates as a priority leasing consideration.

EMPLOYEE TRAVEL AND SECURITY

Corporations' most serious hotel safety concern



Source: Corporate Travel

Hotel fires and crime are the most serious concerns of travel managers.

TRAVEL

Executives Seek Security

Travelers think about more than conventions and power lunches while they're away on company business — they're concerned about hotel safety and security, says a *Corporate Travel* survey of 200 corporate managers.

Almost half of respondents — 49 percent — say they and company travelers are very concerned about hotel safety and security. Just 10 percent say they are not very concerned.

Travel managers and travelers are most concerned about hotel fires; 48 percent share this concern. As for experience, 15 percent witnessed a hotel fire while on a business trip. And while theft in hotel rooms is a concern for just 11 percent of respondents, 57 percent have experienced a theft in a hotel while traveling on business.

Forty percent of managers have checked into their corporation's liability if employees are involved in a safety incident at a preferred hotel. They found that the corporation is liable 49 percent of the time.

The increase in female business travelers has intensified safety concerns for 59 percent of respondents.

To increase security awareness among employees who travel, 79 percent of managers provide travel and security information. These security tips are most often included in brochures and in ticket jacket stuffers.

ECONOMIC TRENDS

1980s Trends Impact 1990s Security Objectives

The 1980s saw an increase in poverty, decreasing income and a lower unemployment rate.

Robert Shellow, Ph.D., president of the International Association of Professional Security Consultants, tells SECURITY that the statistics do not point to rampant crime for this decade.

"The underclass doesn't have a monopoly on the impulse to criminality," Shellow says. "A huge proportion of crime occurs because the opportunity for any passerby to commit the crime is there."

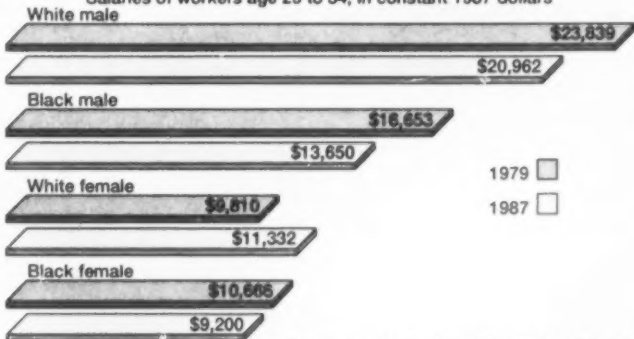
Shellow says that American business too often overlooks implementing security until a catastrophe occurs. He suggests more physical and procedural barriers to discourage crime.

"Many would-be perpetrators are easily discouraged," Shellow says. "When faced with enough obstacles, their urge to commit crime disappears."

Shellow points to one trend security must keep an eye on: A population increase of the group most likely to commit crimes — males age 17 to 25. This will present an extra challenge for security, he says.

SOCIOECONOMIC TRENDS IN THE 1980s

Salaries of workers age 25 to 34, in constant 1987 dollars



Sources: Bureau of the Census, Bureau of Labor Statistics

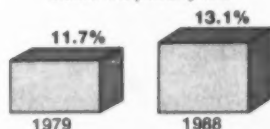
UNEMPLOYMENT

Annual Percentage



POVERTY

Percentage of people living below the poverty line



The close of the 1980s saw more people making less money. Consultant Robert Shellow, Ph.D., says poor people, however, don't hold a monopoly on crime.

BIOMETRICS

Voice, Fingerprint Lead Biometric Growth

The biometric industry saw its greatest rate of growth ever in 1989, according to Warfel & Miller.

The number of unit shipments rose 167 percent in 1989 to 4,280, and sales increased 90 percent to \$8,650,000.

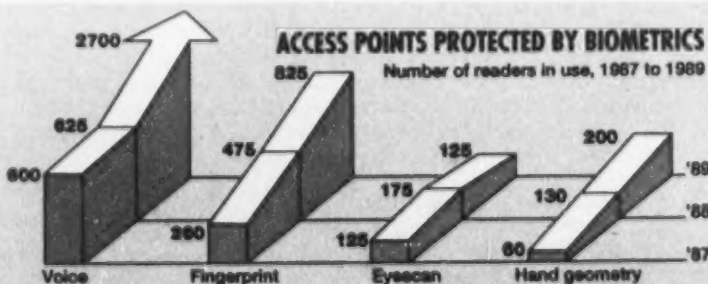
Despite fast-paced sales, 1989 was a relatively slow year for new product introductions. From 1984 to 1987, between four and six new biometric iden-

tifiers were introduced — and disappeared — each year. Only three new products were introduced in 1989. Warfel & Miller reports that this smaller biometrics field has an improved overall quality of products.

Voice verification for access control was the most popular biometric technology in 1989, with new installations controlling over 2,700 points of physical and computer access. Sales of fingerprint verifiers fell below expectations in 1989, but the market still grew substantially. Signature and hand geometry saw modest growth, and eyescan and keystroke protected fewer access points.

ACCESS POINTS PROTECTED BY BIOMETRICS

Number of readers in use, 1987 to 1989



Source: Warfel & Miller

Voice verification saw the greatest growth among biometrics between 1987 and 1989.

NEWS

Security Wrap Up: ATMs, Drugs, References, Shoplifting

► Your chance of getting robbed when you use an automatic teller machine is less than one in a million. Banks, however, have a one in four chance of losing money due to ATM frauds such as intentional overdrafts and unauthorized use of ATM cards.

► Companies report that absenteeism is the most prevalent consequence of drugs in the workplace. Runners-up include accidents, increased medical expenses, insubordination, theft and product or service quality problems.

► More companies are refusing to give references for current or former workers. The reason: They are worried about being sued for libel if the worker learns that a reference was not complimentary.

► A new anti-shoplifting device will help defeat shoplifters who try to remove electronic article surveillance (EAS) tags. New EAS tags sound a beep when tampered with. The tags cannot be deceived by foil-lined bags and once activated will continue to beep until turned off by store personnel.

SERVICES

A guide to selecting and staying informed on security services.

Tireless Wireless Gets User Boost

By Rebecca D. Russell
Senior Editor

It's tough to teach an old dog new tricks. Wireless alarm systems have been a new trick, one which installers have been slow to adopt in deference to traditional hard wired systems.

And wireless' reputation precedes it. Holding it back, insiders claim, were costly equipment, rampant false alarms and general unreliability.

That reputation is changing. Cost has decreased and technology has improved, making this alarm option more attractive.

In a recent national SECURITY survey, 48 percent of respondents say they use some type of wireless alarm system. Of the 52 percent not currently using wireless, 15 percent plan to use it in the next year.

Long a reputed fixture in retail stores, SECURITY's exclusive survey shows most use in the industrial sector.

Interest Growing

National security service firms also generally agree that there is increased interest.

Says Ron Saldin, manager of Honeywell product development, "It's always been accepted by users. The hurdle has been with installers."

Tom Cowherd, marketing manager, ADT Co. Inc., Parsippany, N.J., says, "There's interest but it's not the predominant system we sell."

National Burglar and Fire Alarm Association executive vice president Dick Bugbee says, "Some of the old-time installers are not keen on it, but people are accepting it more."

Wireless is, naturally, not suited to every application. But for the installer, ease of installation — which can translate to labor costs — is an important factor.

Says Craig Leiser, vice president of marketing and dealer operations, National Guardian, Minneapolis, "The product has gotten more reliable. Deal-

ers are more willing to try to install it. When they look at the cost of installing a system, hard wiring equipment may cost less but labor will be more than installing a wireless system."

James Lees, president, Sentry Alarms, Boston, says "The technology for wireless is 90 percent as reliable" as hard wired systems. As the cost of

Cost has decreased and technology has improved, making wireless more attractive than ever.

wireless continues to come down, it will be more competitive, he says.

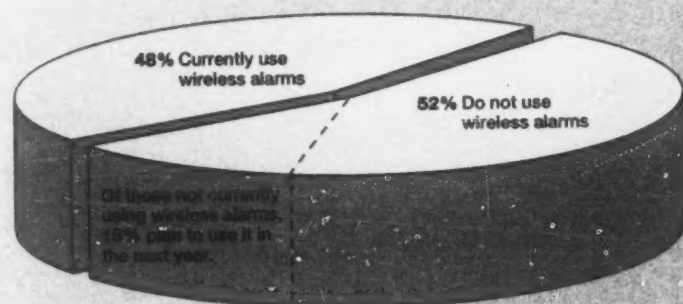
Improved Technology

Equipment improvements include better batteries — often lasting up to 7 years — which enhance system maintenance. Plus, Saldin says, systems can now be used in formerly problematic sites, such as near construction.

Lou Fiore, National Guardian vice president of technical services and purchasing, anticipates more hybrid systems that combine wireless and hard wired systems.

"The type of system used is transparent to the user and the central station," he says. "We've reached a point where reliability is comparable. It's no longer black and white; it's getting gray."

BUSINESS USE OF WIRELESS ALARM SYSTEMS



Source: SECURITY

Nearly half of SECURITY readers polled report using some type of wireless alarm system. Most use is in industrial applications. Nearly one-third of those not using the equipment now plan to hook up with it this year.

Wireless Buying Tips

When looking at a wireless alarm system, consider these factors.

- Find a reputable installer with experience installing wireless systems. Check into how long the installer has been using wireless. "There's an art to it," says Craig Leiser, vice president of marketing and dealer operations, National Guardian, Minneapolis.
- After your installer determines if wireless is the best system for your site, learn about the product brand and model. Also check into how many units the manufacturer has made. To cut this will cut your chances of being a guinea pig.
- Check with other wireless alarm customers to discuss kinks and special circumstances which could affect performance at your organization.
- For a comprehensive rundown of security system installers, listed both nationally and by state, look to SECURITY's 1990 Directory of Products and Services.

Products and services by category **INSIDE**. Problem-solve. Check out the listings!

Easy **DISASTER PLANNING STEPS** you can use on-the-job now. Pages 1 and 11.

ISC 1990 Conference Coverage, Photos, Products. See page 18.

GET DETAILS on products and services listed. Use reader service cards. Page 21.

SECURITY^{T.M.}

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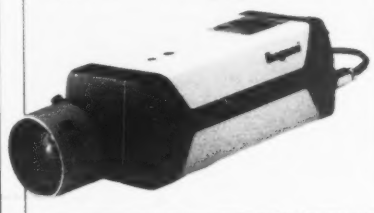
PRODUCT UPDATE • SPECIAL EDITION

Problem Solving Products



For more information on EXD-1 and EXD-1F modular delayed exit locking systems from Securitron see page 7.

Ikegami's ICD-41 black-and-white camera accepts most 1/2- and 2/3-inch format lenses. For more details see page 6.



Security Takes Lead Role In Disaster Planning

By Leigh Gaines
Contributing Writer

Valdez, Hugo, San Francisco — 1989 was the year of the disaster.

Yet 1990 just started when AT&T long distance service crashed, along with thousands of telephone-dependent firms.

Big disasters grab headlines. Little disasters just grab your firm's throat. Aggravating the threat is increased reliance on technology.

Business now strongly encourages contingency plans with security playing an active role. It couldn't have come at a better time. Most companies lack a plan:

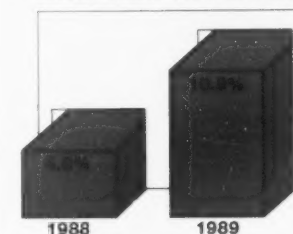
Only about one-fifth of U.S. firms have broad-based disaster plans that outline complete recovery steps.

"More often, it's a matter of

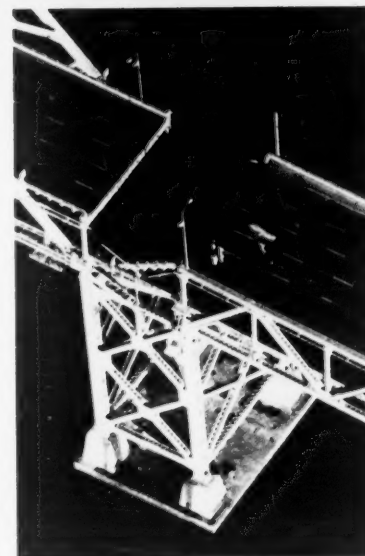
Continued on page 8

DISASTER PLANNING SOARS

Security departments double outside disaster use of services



Source: SECURITY



The ultimate disaster? October's San Francisco earthquake tested security's disaster plans as companies coped with the tremor. Those who planned for it fared better.

5 HOTTEST TRENDS

By Bill Zalud
Editor

You can make change work for you by leveraging industry trends.

Five of today's hot trends are microprocessors, integration, partnerships, tailored services and equipment downsizing.

1 Microprocessors
Embedded within gear or as personal computers that drive systems, microprocessors add advantages and cost.

Benefits: intelligence, memory, ease of installation/operation and connectability.

"Computer power kicks up cost," points out Sandy Jones, president of Sandra Jones & Co., Richmond Heights, Ohio. "But data received and speed of response make it more attractive."

The gear helps balance equipment with people. "The labor market is squeezed. Computers add functions and features to make up for the labor losses," says Jones, who

formed a consulting firm after running a successful security equipment distribution business.

2 Integration
The most controversial hot button, integration can be viewed as the smooth joining of diverse equipment or systems. While integration has myriad benefits, many feel security and life safety systems have importance for a separate identity.

Yet facilities management,
Continued on page 14

Product Update: Special Edition

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Thinking About the Unthinkable

It's a challenge security cannot pass up. Plan for the worst so people and assets are protected most and your business can resume normal operation quickly.

Bonus coverage in this Product Update Special Report complements the cover article that appeared in your latest, March SECURITY. Both the cover article on how you can conduct a disaster drill as Owens-Corning Fiberglas Corp. did in Toledo, Ohio, and the how-to disaster planning articles in this newspaper provide you helpful insurance.

In addition, disaster prevention in minor and major ways is the aim of the more than 100 products and services showcased here.

The challenge is before us. Planning for disaster is one of many ways that security protects and provides a safe and secure working environment.

Products and services by category INSIDE. Problem-solve. Check out the listings!

EASY DISASTER PLANNING STEPS you can use on-the-job now. Pages 1 and 11.

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1 Five Hottest Trends

1 Problem Solving Products

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15 Integrated Systems

15 Intrusion Protection

16 Monitoring

16 Security Office Products

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17 Outdoor Protection

17 Computer/Info Security

18 Product, Profession Evolution Evident at ISC South

21 Reader Service Card

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SECURITY (ISSN 0890-8826) is published monthly, except for March, June and September when two issues are published in national and separate editions, by The Cahners Publishing Company, A Division of Reed Publishing USA, 275 Washington St., Newton, MA 02158-1630. Terrence M. McDermott, President; Charles E. Moodhe, Senior Vice President/General Manager, Chicago Division; Jerry D. Neth, Senior Vice President/Publishing Operations; J.J. Walsh, Senior Vice President/Finance; Thomas J. Dellamaria, Senior Vice President/Production and Manufacturing; Ralph Knupp, Vice President/Human Resources. Circulation records are maintained at Cahners Publishing Company, 44 Cook St., Denver, CO 80206-5800. Phone: 303/388-4511. Second-class postage paid at Denver, CO 80206-5800 and additional mailing offices. Postmaster: send address corrections to **SECURITY** at our Denver address. **SECURITY** copyright 1990 by Reed Publishing USA; Ronald G. Segel, Chairman and Chief Executive Officer; Robert L. Krakoff, President and Chief Operating Officer; William M. Platt, Senior Vice President. Annual subscription rates for non-qualified people: USA, \$59.95; Canada/Mexico, \$89.95; other countries, \$115 for surface mail and \$165 for air mail. Special issues, including product directory, are \$50. Except for special issues where price changes are indicated, single copies of regular issues are available for \$10, \$14 and \$18 (USA, Canada/Mexico and foreign). Please address all subscription mail to **SECURITY**, 44 Cook St., Denver, CO 80206-5800.

Access Control

Bar/Stripe Reader

- reads multiple bar codes
- for ID badge scanning

The Series 10 bar code and magnetic stripe reader automatically programs itself to read multiple bar codes. Usable with varied input devices, the reader is available as a wedge unit which plugs into the keyboard line for IBM and Wyse computers and terminals. — *Percon*

For information circle 298



Cards and Keys

- interface to systems
- combos boost security

There's a full line of Wiegand cards, proximity keys and readers to interface with Corby access control systems. The systems can set for card only, keypad only or a combination of card and keypad. — *Corby Industries Inc.*

For information circle 314

Access Control Graphics

- operator friendly
- on-line manual

The new Picture Perfect access control system from Casi-Rusco uses sophisticated computer graphics and windows to aid the operator during setup and use. Information is controlled via windows. Included is a function called input field validation to prevent mistakes. — *Casi-Rusco*

For information circle 301

PC-Driven Access Control

- distributed data bases
- 64 reader standard

The SAC-300 access control system from Sensormatic Electronics Corp. is a fully distributed processing system. Each of up to 32 remote reader interface panels has its own data base for up to 4,000 cards. The data base is automatically downloaded after editing. — *Sensormatic Electronics Corp.*

For information circle 307

Bar Code/Badge Reader

- optional LED
- high/low optics

The new Scanteam BCR-6400 bar code card or badge reader from Welch Allyn is available with a combination of factory and user selectable operational configurations. Optical centerline and cord exits are user selectable. — *Welch Allyn Inc.*

For information circle 306

Magnetic Stripe Reader

- reads both directions
- optional PINPad

The Mag-Wedge from Mag-Tek is a magnetic stripe card reader that reads cards in both directions. It has no external interface, plugging directly into a personal computer keyboard port. There is an optional PIN Pad available. — *Mag-Tek Inc.*

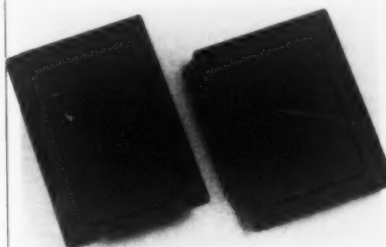
For information circle 297

Lock-Release System

- reads mag patterns
- uses proximity-type key

Entry into secure premises may be controlled by a new lock-release system from Scotland. Entrepod from Instrumentation and Microelectronic Systems works by means of a pattern of digital magnetic fields. When an Entrepod key is held near a reader-sensor, the information magnetically coded within the key is read and compared with memory. — *Instrumentation and Microelectronic Systems*

For information circle 308



Intercom Access Control

- outdoor use
- surface or semi-flush

Two new weatherproof outside door stations from Aiphone Corp. work with several of the company's intercom systems. Both the ID-DA surface mount and the ID-NC semi-flush mount are of ABS plastic and anodized aluminum. The outside stations work with Aiphone's IC, TD-H, TB-T and RCX Series intercom systems. — *Aiphone Corp.*

For information circle 310

Stand-Alone Keypad

- 2, 8, 32 codes
- built-in timer

The new IEI-200 Series stand-alone keypad comes in three models with two, eight or 32 programmable codes. There's also

a weatherproof version. The unit has a built-in timer, 1 to 6 digit codes with repeatable numbers and programming from the keypad. — *International Electronics Inc.*

For information circle 319

Access Plus PC Uses

- 1 to 256 doors
- parking package

A new access control system from Marlee Electronics Corp. controls one to 256 doors, plus it provides office computer applications. Standard are high security differential optics card readers. Generic readers and prox are optional. A parking package includes space counting, smart anti-passback, nesting and single use keypad. — *Marlee Electronics Corp.*

For information circle 318



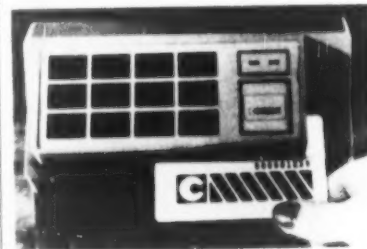
Keypad Access Control

- four-digit, nonrepeating
- momentary or latch

The DK-85 and DK-86 access control systems from Ultrak are

12-button, tactile feel devices that operate at 6 to 16V. The units are field programmable via jumpers. Key and panic relay output modes are momentary or latch selectable. — *Ultrak*

For information circle 311



Flexible Access Control

- PC-driven
- single to 30-door

The Locksmart access control system by Racal-Chubb can provide systems from a single-door smart reader to a total access management system. Capacities from 500 to 2,000 cards, including mag stripe and Wiegand with either insert or swipe readers are available. — *Racal-Chubb*

For information circle 274

Access Control Plus

- interactively communicates
- scrolling messages

The Classiq-200 intelligent reader performs access control, alarm monitoring and time and attendance data collection by incorporating PC, interface and reader functions. Accepts up to 40,000 badges; stores 3,000 transactions; 9 security level tables. — *Applied Realtime Systems Inc.*

For information circle 300

Security Takes Lead Role In Disaster Planning Needs

Continued from page 1

business planning," says Ken Beraduce, president of K.J. Beraduce & Associates, a Youngstown, Ohio-based disaster planning consulting firm. "People now ask how to keep business and computers running."

Business Failure Is Possible

Failure to answer that question often leads directly to business failure. Half of all companies who don't recover from a disaster within 10 business days file Chapter 11 or never fully recover.

Here's a step-by-step contingency planning strategy.

- ▶ Get top management approval before undertaking a disaster plan.
- ▶ Seek outside advice. A few key tips from a disaster expert could save time and money.
- ▶ Do a thorough risk analysis. Determine critical operations and

prioritize them.

- ▶ Consider probable scenarios; do not develop a plan for every possibility.

- ▶ Determine people and resources for critical operations.

- ▶ Map out recovery strategies. Depending on your needs, hire people to assist.

- ▶ Determine a chain of command for top management and security.

- ▶ Assign duties, matching employees to recovery functions in their area.

- ▶ Plan security at the disaster site and temporary work locations.

- ▶ Include life-safety skills training.
- ▶ Document your plan. Store copies off-site.

- ▶ Get top approval of the plan.

- ▶ Communicate the plan to all employees.

- ▶ Test the plan frequently and evaluate your results.

Number-Scrambling Keypad

- single-digit display
- system compatible

The new Gemini security keypad from Architectural Control Systems Inc. features numerical scrambling technology, limited viewing angle and four locking modes. The Gemini 1370 responds to 434 different user codes and seven user groups. — *Architectural Control Systems Inc.*

For information circle 302

PC Access Control

- bar codes used
- monitors time, status

PC Doorman provides electronic access control and monitoring of computers through software. ID cards replace keys and bar code readers transmit user codes to a host computer where the PC Doorman data base verifies authorized access through an access point controller that actuates the locking device, usually an electrically controlled door strike. — *H & M Electronic Systems*

For information circle 241

CCTV/Surveillance

CCTV Text Inserter

- compatible with registers, ATMs
- uses standard RS-232

The new 5132 Text Inserter from GYR allows digital text

from electronic cash registers, automatic teller machines and other digital devices to be recorded onto a videotape along with images received from video cameras. — *GYR division of Odetics*

For information circle 212



Compact CCTV Camera

- solid-state MOS
- 78° view

The VK-M10 camera from Hitachi is an extremely compact black-and-white camera. With solid-state MOS image sensor at two lux and wide angle lens for 78° viewing. The camera has an auto iris and built-in microphone. — *Hitachi Industrial Products division*

For information circle 275

Five Microminiature Cameras

- color or black-and-white
- over 360 lines

Toshiba recently introduced five microminiature cameras for security and surveillance uses. There are three color and two

black-and-white cameras. The IK-M30A and IK-C30A color cameras feature 1/2-inch CCD image sensor chip for over 360 lines, auto tracking and fast electronic shutter. — *Toshiba*

For information circle 291

Quad Output Switchers

- thermal management
- modular construction

Six new quad output VF series switchers from Deltron Inc. provide 5V at 120A on the main and 5, 12 and 24V combinations on auxiliaries. All outputs are isolated, and switching is regulated. — *Deltron Inc.*

For information circle 215



Video Motion Detection

- video to digital
- telephone line links

Movicom CCTV Controller provides video motion detection using microprocessors, hard disk memory and special software. With the digital format, numerous controllers can be at remote sites and linked to a central reception unit. — *Hymatom/RJS Industries*

For information circle 266



Three Output CCD Camera

- two-speed shutter
- color lock synch

The new 6800 Series remote-head color CCD camera from Cohu Inc. has separate outputs for RGB, Y-C (S-VHS) and NTSC video. It has a two-speed electronic shutter, a high 50 dB signal to noise ratio and a half-inch blemish free image sensor. — *Cohu Inc.*

For information circle 224

High Sensitivity Camera

- 600 lines horizontal
- frame-transfer image sensor

A new high sensitivity CCD camera has been introduced by Audio Video Supply Inc. Key features of the camera include 600 lines horizontal resolution, high speed shutter, minimum scene illumination of 0.3 lux with f1.4 lens and a frame-transfer image sensor. — *Audio Video Supply Inc.*

For information circle 227

Vicon Fiber Optic Line

- 21 different systems
- transmit over single fiber

The Vicon Optech Fiber Optic system ranges from single-channel video links to two-way video, data and audio over single fiber. — *Vicon Industries*

For information circle 271

► Update procedures and orient new employees.

From the Carolinas to San Francisco, companies that plan beforehand survive and prosper. Some even learn new tricks while under fire.

Addressing Employee Needs

For example, when Hurricane Hugo devastated Charleston-based automotive parts manufacturer Robert Bosch Corp., 65 employees also suffered, some losing everything they owned. The company provided employee aid — from temporary housing to diesel generators to food supplies.

The company also rented furnished apartments for employee families who lost their homes. By showing that the company cares about its employees' well-being, workers are more likely to respond to the company's disaster as well as their own, says Nordquist.

When the Earth Shook

On the other coast, one San Francisco-based company credited

its contingency plan for quick recovery from the earthquake.

Only days before tragedy struck, nearly 100 employees of discount brokerage giant Charles Schwab & Co. Inc. gathered at a site outside San Francisco, the firm's corporate headquarters. Director of Security Keith Headman directed testing of a segment of the recently developed contingency plan.

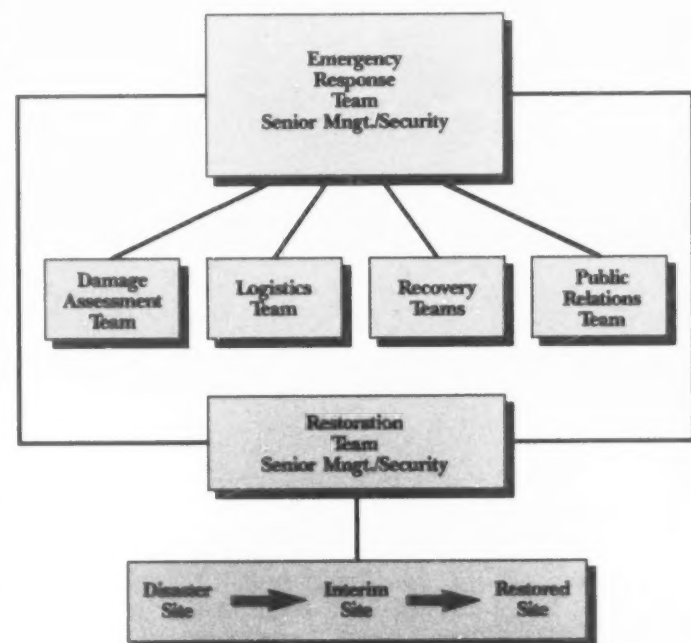
Then at 5:04 p.m., Oct. 17, Headman sat in his 21st floor office when he felt the building sway and shake violently.

"It was the end of the day. About 400 to 500 people were in the building," recounts Headman. "Immediately, we got on the public address system to tell everyone to stay in the building and wait for further information."

Guided by the new contingency plan, Headman and security officers went to work assessing damages and injuries.

Stories on Hugo and San Francisco earthquake lessons learned appear in "Disaster Planning Protects Assets" on page 11. □

Managing A Company Crisis



Source: Security

A disaster plan includes teams with assignments.

APRIL 1990 / A CAHNERS PUBLICATION

SECURITY^{T.M.}

THE MAGAZINE FOR SECURITY DECISION MAKERS

C/850-12
SPECIAL UPDATE:
ACCESS CONTROL

Security Public Relations Mission

Avoiding
Failure

Undercover
Dangers
Exposed

Equipment Focus:
Intercom's
Protection Voice

Bob Trinkle
Director of Security
Floyd Memorial Hospital



SECURITY^{T.M.}

THE MAGAZINE FOR SECURITY DECISION MAKERS

A CAHNERS PUBLICATION/VOLUME 27, NUMBER 4/APRIL 1990

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CENSUS '90



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PROMOTING SECURITY'S IMAGE
Learn how a public relations mindset helps security.
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Solutions to problems to hold failure at bay.
- 33 **BURNED OUT! ARE YOU 1 IN 10?**
Burnout can strike any time. It can be beat.

BONUS PULL-OUT SECTION

- 35 **ACCESS CONTROL UPDATE:
FLEXIBILITY IS THE FUTURE**
Discover decision makers' access control solutions.



Different solutions for different sites: Access control technology is available for any security need.

On the Cover

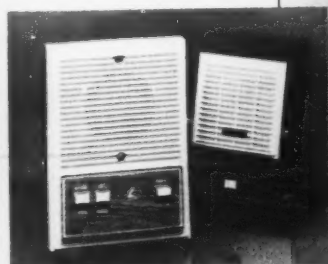
Bob Trinkle, director of security, Floyd Memorial Hospital, New Albany, Ind., puts public relations to work for security. (p. 24)

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Uncover Inside Crime**
Not enough staff members to conduct an undercover investigation? Here's what you need to know to hire a pro.

EQUIPMENT FOCUS

- 70 **Intercom Systems
Send Clear Message:
Security Takes
Access Control
Seriously**
Intercom helps security communicate with the right people.



From push button to video, intercom stands ready to help with access control. (p. 70)

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SECURITY (ISSN 0890-8826) is published monthly, except for March, June and September when two issues are published in national and separate editions, by The Cahners Publishing Company, A Division of Reed Publishing USA, 275 Washington St., Newton, MA 02158-1630. Terrence M. McDermott, President; Charles E. Moodhe, Senior Vice President/General Manager, Chicago Division; Jerry D. Neth, Senior Vice President/Publishing Operations; J.J. Walsh, Senior Vice President/Finance; Thomas J. Dellamaria, Senior Vice President/Production and Manufacturing; Ralph

Knapp, Vice President/Human Resources. Circulation records are maintained at Cahners Publishing Company, 44 Cook St., Denver, CO 80206-5800. Phone: 303/388-4511. Second-class postage paid at Denver, CO 80206-5800 and additional mailing offices. Postmaster: send address corrections to **SECURITY** at our Denver address. **SECURITY** copyright 1990 by Reed Publishing USA; Ronald G. Segel, Chairman and Chief Executive Officer; Robert L. Krakoff, President and Chief Operating Officer; William M. Platt, Senior Vice President. Annual subscription rates for non-qualified people: USA, \$59.95; Canada/Mexico, \$89.95; other countries, \$115 for surface mail and \$165 for air mail. Special issues, including product directory, are \$50. Except for special issues where price changes are indicated, single copies of regular issues are available for \$10, \$14 and \$18 (USA, Canada/Mexico and foreign). Please address all subscription mail to **SECURITY**, 44 Cook St., Denver, CO 80206-5800.

SECURITY INDICATORS

Trends and forecasts for determining loss prevention needs.

SECURITY SURVEY

Covert Investigations: A 1990s Standard?

Sixty-nine percent of organizations conducted a covert investigation in the last year, says SECURITY's First Quarterly Telephone Survey.

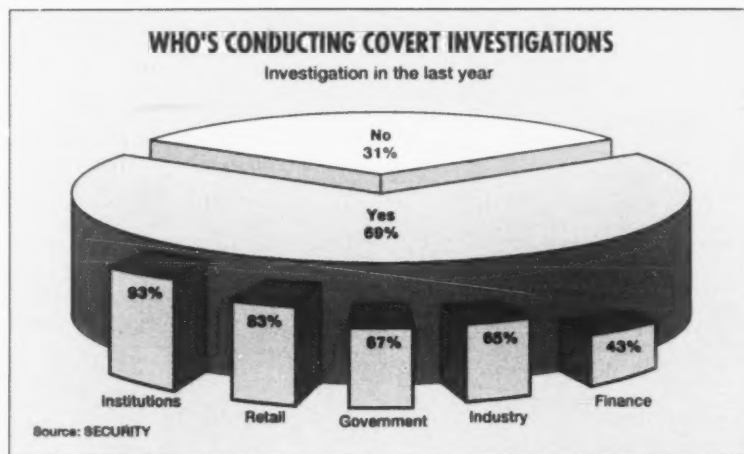
Covert investigations are most prevalent at institutions, where 93 percent conduct this type of investigation.

Investigations are most often conducted by the organizations, the survey says.

Sixty-nine percent handle the investigations internally, 9 percent bring in an outside service firm and 22 percent use both internal staff and external services. Institutions are most likely to conduct an internal investigation, while financial organizations most often look to an outside service firm. See this month's SERVICES for more on this.

In other First Quarterly Telephone Survey news, just 4 percent of security decision makers experienced wire tapping or phone bugging in the last year.

Although wire tapping isn't a top concern, respondents continue to secure



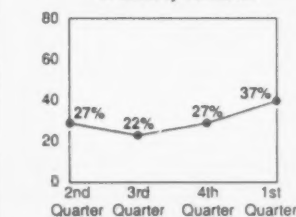
A majority of organizations conducted a covert investigation in the past year.

privacy within their organizations. An average 40 percent say their organizations have secure telephones. The government has the most secure telephones, at 59 percent.

Security decision makers saw an increase in security incidents in the First quarter of 1990. SECURITY's quarterly tracking question, "Has the number of security incidents increased, decreased or remained the same over the past three months?" shows that an average 37 percent of respondents report an incident increase.

TRACKING SECURITY INCIDENTS

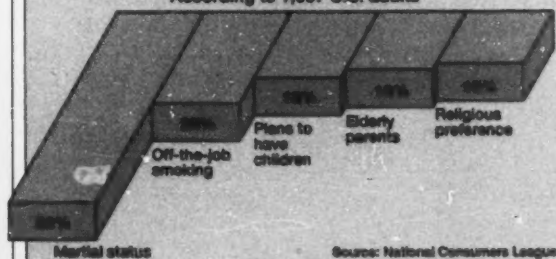
Average percentage reporting an increase in security incidents



First Quarter incidents increased.

INTERVIEW TOPICS JOB CANDIDATES FIND ACCEPTABLE

According to 1,007 U.S. adults



As awareness about employee privacy rights increases, job candidates find fewer interview topics acceptable.

EMPLOYMENT SCREENING

Job Seekers Identify Taboo Interview Topics

When interviewed, the last thing applicants want to be asked are questions that do not relate to job performance, says a National Consumers League Survey of more than 1,000 American adults.

More than 50 percent of respondents say it's acceptable for a prospective employer to ask them about their marital status. But job seekers say interviewers don't have the right to ask questions about off-the-job smoking, plans to have children, religion or cohabitation. Job candidates' unwillingness to divulge personal information reflects the push for tougher privacy laws.

Regardless of what applicants find acceptable, 79 percent say they have been asked at least one question that many respondents believe employers have no right to ask (see chart).

COMPUTER CRIME

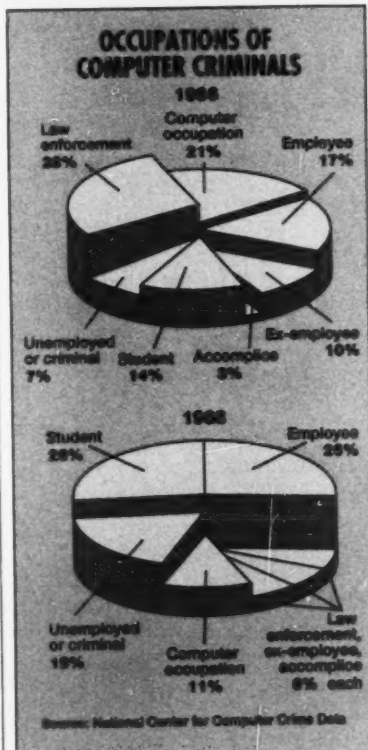
Computer Criminals Evolve: Students, Employees Dominate

While law enforcement and people working in computer-related occupations committed nearly half of all computer crime in 1986, the National Center for Computer Crime Data reports 1988 saw a surge of computer crime by students, employees, the unemployed and criminals.

The increase in crime committed by non-computer personnel reflects the rise in computer literacy among the general population. Students and employees working outside data processing accounted for a combined 52 percent of computer crime in 1988; these groups committed 31 percent of computer crime in 1986.

Theft of services is the fastest-growing computer crime. Thirty-four percent of 1988 computer crime was due to theft of services, compared to 10 percent in 1986. Money theft is still in first place, but this type of incident dropped 9 percent in 1988. New to the computer crime list are harassment and extortion, tallying six combined incidents in 1988.

Commercial users, telecommunications and government lead as the most popular targets of computer crime. Bank incidents dropped 6 percent.



Students and non-computer employees commit the majority of computer crimes.

NEWS

Security Wrap-Up: Drug Testing, Crime Trends

▶ Revenues from drug abuse testing will jump to \$340 million this year, up 48 percent from 1989. Eight million people were tested for drugs in 1989. Thirteen million are expected to be tested in 1990.

▶ A recent Washington Post-ABC News Poll finds that 63 percent of Americans think the crime problem will get worse in the next 10 years. Sixteen percent expect the problem to improve.

▶ A National Lighting Bureau study says effective lighting can contribute to fewer security-related problems, reduced security costs, improved image, avoidance of legal problems, higher occupancy rates, less turnover and better morale.

▶ An identical twin with a criminal record, in contrast with a fraternal twin, is twice as likely to have a co-twin with a criminal record. Identical twins are also more similar than fraternal twins in the frequency of criminal behavior they admit to on anonymous questionnaires. And the more serious an offender a biological parent is, the greater the risk of criminality for his or her child, particularly in cases of property crime.

HOSPITAL SECURITY

Overall Hospital Incidents Drop; Homicides Emerge

Hospital arson, armed robbery, kidnapping and assault incidents declined by more than 50 percent between 1986 and 1987, according to an International Association for Hospital Security (IAHS) survey.

IAHS statistics show that assaults, the most prevalent hospital security incident, dropped from 2,118 in 1986 to 988 in 1987. Homicide and theft, however, increased in 1987; there were four homicides in 1987, as opposed to zero in 1986.

Theft incidents per hospital increased from an average of 51 in 1986 to 66 in 1987. Average dollar loss due to theft incidents increased from \$17,500 in 1986 to \$21,934 in 1987.

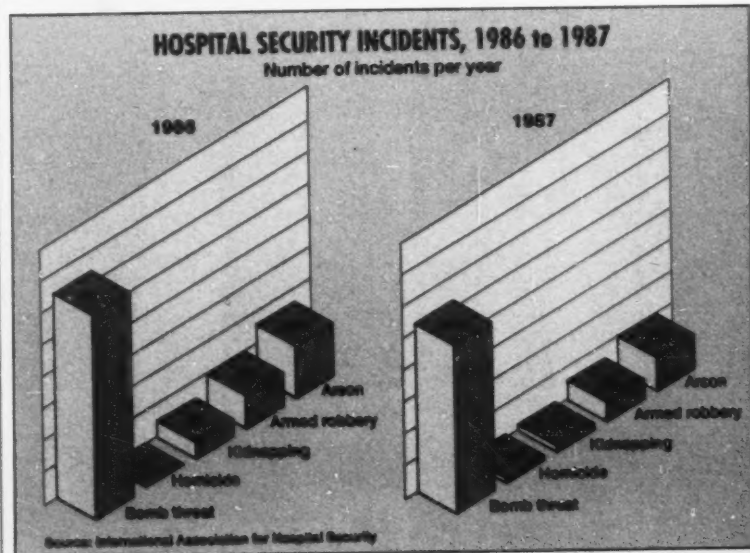
Security-related lawsuits against hospitals in 1987 most frequently alleged an inadequate number of security personnel or inadequate training.

The frequency and types of crime among inner-city, urban and rural hospitals are similar, the studies show.

Tom Kramer, past IAHS president

and director of security at Henry Ford Hospital, Detroit, says hospital crime statistics are affected by mergers, networking, hospital closings and the high percentage of unreported incidents.

"A lot of hospitals really don't want to share this type of information," Kramer tells SECURITY. "Kidnapping, especially, may go unreported due to the sensitivity of the issue."



The most recent hospital statistics show a decline for most violent crimes.

ISSUES

Insight and opinion on vital issues that shape security.

EQUIPMENT

The Japanese Influence on CCTV

By Joseph H. Olmstead Jr.

Unlike the burglar alarm marketplace, the Japanese have a heavy influence on the direction the video security marketplace is taking.

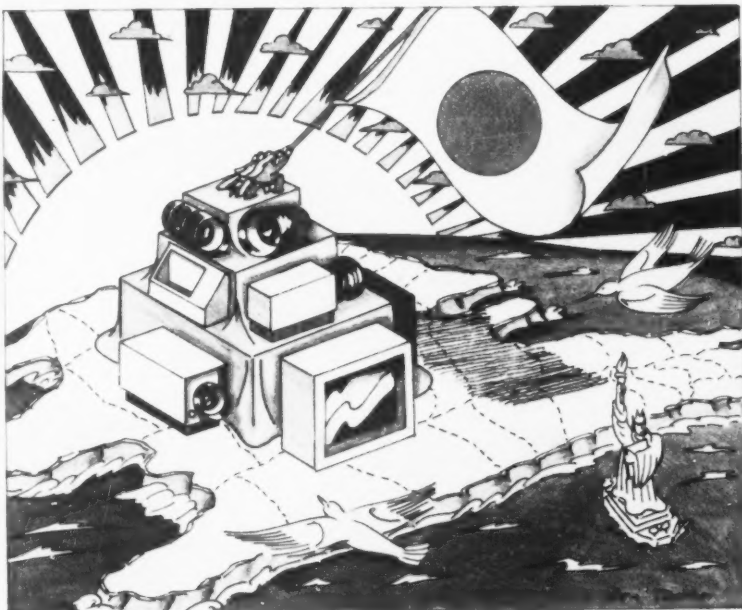
Ten of the top suppliers of cameras and monitors in the United States are Burle, Panasonic, Sony, Sanyo, Toshiba, Ikegami, Hitachi, Mitsubishi, JVC and Koyo. Burle is the only U.S. manufacturing company on this list.

Why are the Japanese such a dominant force? The answer is obvious when you consider they are among the leaders in both consumer and professional video product design and manufacturing. Therefore, the U.S. CCTV marketplace is the industrial extension of the other two.

Yet, is this bad for our video security industry? Not in this writer's opinion.

Changing Marketplace

The burglar alarm marketplace is somewhat stagnant these days. Savvy burglar alarm dealers are adding CCTV to their product offering. Traditional burglar alarm distributors often find that between 15 and 20 percent of their sales now come from CCTV products and accessories. And products from many of the Japanese companies listed



Japanese video technology design has influenced the U.S. CCTV marketplace growth.

above can be found on their shelves.

So what? The what is that there are CCTV products and accessories being designed and manufactured by dozens of American manufacturers as well. In other words, the Japanese have helped the U.S. CCTV marketplace grow dramatically over the past few years with sophisticated use of video technology and stylish packaging.

American video security product marketing companies and manufacturers are enjoying good growth today. Companies like Cohu, American Dy-

namics, Pelco and Robot Research, to name a few, gain market share each year.

The Japanese may dominate today but good old-fashioned American ingenuity and hard work are paying off. The picture is clear to me: The future of the U.S. CCTV industry is bright.

Joseph H. Olmstead, Jr. is with the Security Industry Association, the premier security manufacturer's trade group and co-sponsor of the International Security Conferences. He is Vice President-Sales for Robot Research.

SERVICES

A Bigger Market: Does It Mean More Security Influence?

By Joseph P. Freeman

Traditional security systems are solving more non-security problems than ever before. With security systems used for time and attendance, fuel management, job cost control and similar ap-

plications, will security lose control or will it gain influence?

You know the traditional notion of security: overhead expense to safeguard operations and limit exposure.

Traditional guard services and older photo-ID and intrusion systems tend to corroborate this concept. Things are changing in a significant way, however. Today's security decision maker, armed with a clear understanding of this change, is suddenly in a position to impact overall productivity.

Newer, computer-based card access,

CCTV, photo-ID and biometric systems now offer both improved levels of security and the opportunity for you to demonstrate your creativity by introducing your organization to new operating controls.

Expanding Opportunities

In 1988, for instance, our organization's research indicates that approximately 15 percent of all U.S. card access manufacturer revenues resulted from non-security uses of their products and systems. In 1980, it was 0 percent.

Still debating over the best solution to your guard tour needs?



Let us present a simple case.

The Supercase from GCS. No power cords. No plug-ins. No add-ons. Just a simple-to-operate unit in a totally self-contained carrying case.

The enclosed downloader and printer provide your security supervisor with a completely portable headquarters capable of generating on-the-spot reports and printouts.

As a cost-effective management tool, the quality-tested Supercase has no competition. No other system is as portable. No other system is as rugged. No other system is as simple.

Case closed.



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GCS

GUARD CONTROL SYSTEM

For information circle 9

ISSUES

Such applications as time and attendance, fuel management, job cost control and quality assurance are now proving their value and are being evaluated by many organizations. These systems monitor specific activities, identify true costs and elevate quality. In the process, they often reduce total expenses as well.

Since many of those systems were purchased from card access companies known for their security expertise, security decision makers have at least some

Demonstrate creativity by introducing your organization to new operating controls.

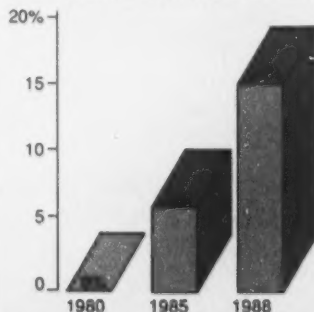
working knowledge of, if not influence over, the selection of a vendor. Thus, it is now possible for you to extend your assistance by providing expert advice about better controls, higher quality and reduced costs.

To the same degree you conduct an effective security survey, you may now make a contribution to an operations survey. How and when this is done depends on your role, influence and qualifications.

These non-security applications are no threat; rather they are an opportunity. It's your opportunity to be more than just security.

Joseph P. Freeman is principal of J.P. Freeman and Co., Newtown, Conn. Services include market research, strategic planning, technology/product and organizational development, executive search and merger evaluation.

NON-SECURITY APPLICATIONS OF ACCESS CONTROL SYSTEMS



Source: J.P. Freeman and Co.

The trend is for access control to do more than security tasks.

SERVICES

A guide to selecting and staying informed on security services.

Covert Investigations Uncover Inside Crime

Rebecca D. Russell
Senior Editor

White collar crime and drug trafficking top business' list of workplace woes. Managers — with security's help — look to contain these hot spots.

Increasingly, business turns to investigative services for help. Respected for handling background checks, investigative specialists can go where in-house security may not — among workers, to gather facts and evidence.

Security decision makers are more than ever directing covert investigations. Of SECURITY readers questioned in an exclusive national telephone survey, 69 percent conducted a covert investigation within their organization in the last year. It's likely this

ment can handle. An investigative service can help clarify the problem says Don Walker, president, Business Risks International, Nashville, Tenn.

When to Call in the Pros

"A lot of companies can't adequately identify their needs because they are too close to the problem or lack the expertise," Walker says.

Company auditors and legal counsel are not necessarily the most qualified to handle an investigation, suggests Andrew Doppelt, JD, CPP, chief executive officer, National Investigative Services Corp., Hinsdale, Ill. An auditor's check may reveal that a full in-house investigation would be too time consuming. It takes investigators less time and money to conduct a comparable investigation, he says.

Remember, too, that an outside investigator does not necessitate police involvement. "The investigation should culminate with discipline and corrective action, not arrest and prosecution. It's not a police case," says Eugene Ferraro, vice president, Krout & Schneider Inc., Los Angeles.

Beyond the Yellow Pages

Choosing an investigative service requires more than opening the Yellow Pages and making a phone call.

"Not all investigators are created



"You want to know that when [the investigator] takes the stand, he is reputable," says Wayne Black.

use of outside firms will increase because of in-house staff cuts and the inherent dangers in covert operations.

Of those conducting an investigation, 69 percent sent existing security staff undercover, while 22 percent used a combination of in-house and contract investigative personnel. However, only 9 percent hired a service to oversee the investigation.

Those who choose to go it alone risk losing impartiality, compromising secrecy and confidentiality and increasing internal liability.

"There is an element of risk," says W.R. McGraw, senior vice president, Guardsmark, Memphis, Tenn. "Employees may lack skills, then find themselves in dangerous situations."

It's important to know when an investigation is beyond what your depart-



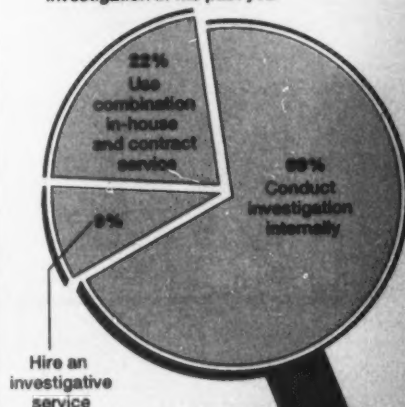
"Your problem did not start overnight. A few days of planning will pay greater dividends," says Don Walker.

equal," says William A. Sharp, vice president, Fidelifacts, New York. "Anyone can become an investigator."

When screening for a reputable investigator, consider these criteria.

WHO HANDLES COVERT INVESTIGATIONS?

Of businesses that conducted an investigation in the past year



Source: SECURITY

Who handles a covert investigation affects cost, confidentiality and liability.

- Get referrals from your organization's legal counsel. Attorneys, especially labor counsel, should be included in all talks and negotiation.
 - Take a close look at the company's upper management and staff. Look for experience among all investigators and supervisors. Find out what screening and training the organization uses as well.
 - Does the organization have a national network of investigators and support services? Accessibility to information is helpful, says Sharp.
 - Investigator credentials are important. In the event of prosecution, "you want to know that when he takes the stand, he is reputable," says Wayne Black, director of special investigations, Wackenhut Corp., Coral Gables, Fla.
- Yet not all investigative companies want investigators to testify in court. If your organization intends to prose-

SERVICES

cute, clarify this issue in the written contract.

- Verify certificates of liability insurance and licensing.
- Look for membership in professional societies that relate to the case you need investigated.
- Get a statement of the investigator's intention of police involvement.
- In writing, look at a proposal of how the investigator plans to meet the investigation's objective and how it plans to provide return on investment.



"Never give the investigator carte blanche. It will expose you to liability," says Andrew Doppelt.

- References and reputation are always important clues to an organization's performance.
- Don't overlook that intangible, chemistry. Communication is critical.

Manage for Success

Once your organization has found a professional to work with, management finesse can help produce a successful outcome.

- Above all, plan your strategy. "Your

problem did not start overnight," says Walker. "A few days of planning will pay greater dividends later."

- Delineating specific issues often determines the success of an investigation, he says. Make sure the company and investigator understand the problem, the scope, fees and legal issues of the case. Also make sure your organization's employees share adequate information to conduct the investigation.
- Set up a communication flow plan. Ferraro suggests identifying one primary contact, along with two others for backup — one of which could be the labor attorney.

"It's important to keep the number of people involved to a minimum," adds Ed McClain, president, Krout & Schneider. He warns that late additions to the decision making team could diminish the value of the investigation to the company, because they were not involved in previous discussions.

- Make sure both parties agree to a specified level of confidentiality, which can be written into a contract.
 - Set time and cost goals for the project.
- "Never give the investigator carte blanche. It will expose you to liability," Doppelt says. Scheduled status meetings allow decision makers to discuss case direction and funding.

Patricia Gallione, president, Gallione Security Services, New York City, says undercover investigations average 3 months. Talk with the service company to get costs for your specific case.

What's Up in Covert Investigations

From investigative service companies, here's a look at undercover investigation trends.

"I think we're fat, dumb and happy right now as a country," says Wayne Black, director of special investigations, Wackenhut Corp., Coral Gables, Fla. He places information security at the top of the covert hit list, a major threat to most corporations. "There are more people going into companies and stealing information," he says.

Black also sees a growing relationship between security and human resources, as the two work together to initiate substance abuse investigations. At the same time, however, he does not see business increasing its use of pre-employment screening tools to decrease these threats.

Don Walker sees a "definite trend of more drug investigations." The president of Business Risks International, Nashville, Tenn., says the company tripled its volume of drug investigations in the last year. Investigations into white collar crime — including the use of computers to commit fraud — is also increasing, he says.

SERVICE BRIEFINGS

► **Managers: Here's how to determine the take home pay for contract security officers.**

Peary Perry, president, Trinity Security Corp., Houston, Texas, says a good rule of thumb is that an officer is paid 62 to 66 percent of the base billing rate per hour. His example: If you are charged \$8 per hour, the guard will be paid at a base starting salary of 62 percent of that figure, \$4.96 per hour.

"The individuals who are being paid at this wage level need to be screened as thoroughly as possible," Perry says, "to prevent accidents or problems that may occur in the future, resulting from careless hiring and training procedures."

► **If transportation security is included in your department's task list, training is available through the Federal Law Enforcement Training Center, Glynnco, Ga. This facility's Cargo Theft Investigation Training Program was developed**

with input from the U.S. Customs Service, Federal Bureau of Investigation and the Bureau of Alcohol, Tobacco and Firearms.

Instruction addresses system solution. Qualified students receive information on the nature of the cargo theft problem; transportation of cargo by air, sea, land and rail; how to trace cargo documentation; plus case management and security methods, including equipment solutions. A 2½-day practical exercise is included.

FLETC offers Seaport Security/Anti-terrorism Training for seaport specialists. Practical exercises include a port visit where students conduct on-site, day and night assessments of security procedures and make recommendations.

For information about these programs contact Charlene Alentado, program specialist, Office of State and Local Training, FLETC, Glynnco, Ga. 31524; or phone (912) 267-2345.

► **Studies guide now available.** The Information Resources Center of the American Society for Industrial Security (ASIS) has issued its second edition of *Guide to Security Industry Market Studies, 1986 to June 1989*.

The 60-page guide lists 128 U.S. and 32 non-U.S. (primarily western-European) market studies published between 1986 and June 1989 and still in print.

Studies cover the market for both security equipment and personnel (including salaries and wages) and some military equipment and new technology market studies. Also included in the publication are studies from related subjects such as fiber optics, fire control and drug abuse testing.

For ASIS members, the cost is \$10; it's \$22.50 for non-members, plus shipping. For ordering information contact: ASIS, Catalog Sales Dept., Suite 1200, 1655 N. Fort Myer Dr., Arlington, Va. 22209; phone (703) 522-5800.

MAY 1990/A CAHNERS PUBLICATION

SECURITY

THE MAGAZINE FOR SECURITY DECISION MAKERS

ISC Central
June 12-14
Dallas, Texas

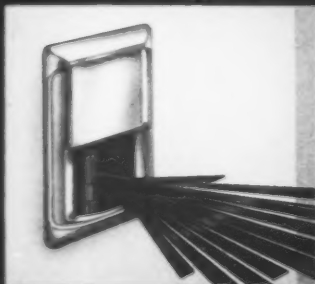


Protecting Our Older Americans

The Trouble
With Ethics

Training Your
Officers Better

Equipment Focus:
Dual Technology Sensors



Robert Chubin
Security and Communications Manager
Westminster-Canterbury House

SECURITY^{T.M.}

THE MAGAZINE FOR SECURITY DECISION MAKERS

A CAHNERS PUBLICATION/VOLUME 27, NUMBER 5/MAY 1990

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Protecting seniors citizens includes clarifying paperwork and other service-related tasks. (p. 31)

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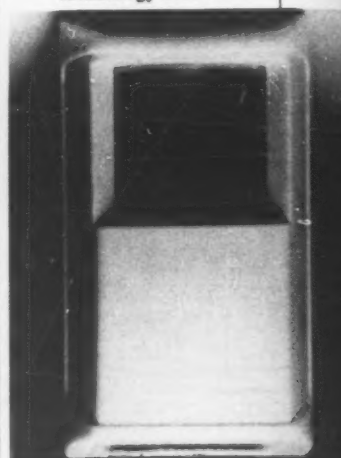
Robert Chubin, security and communications manager at Westminster-Canterbury House, Richmond, Va., fills the service and security needs of residents. (p. 30)

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Double your protection with dual technology sensors.



Dual technology sensors reduce false alarms. (p. 58)

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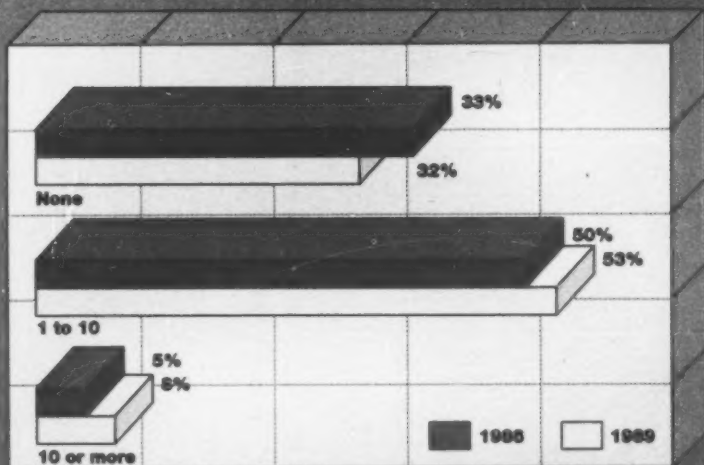
SECURITY (ISSN 0890-8826) is published monthly, except for March and August when two issues are published in national and separate editions, by The Cahners Publishing Company, A Division of Reed Publishing USA, 275 Washington St., Newton, MA 02158-1630. Terrence M. McDermott, President; Charles E. Moodie, Senior Vice President/General Manager, Chicago Division; Jerry D. Neth, Senior Vice President/Publishing Operations; J.J. Walsh, Senior Vice President/Finance; Thomas J. Dellamaria, Senior Vice President/Production and Manufacturing; Ralph Knupp, Vice President/Human Resources. Circulation records are maintained at Cahners Publishing Company, 44 Cook St., Denver, CO 80206-5800. Phone: 303/388-4511. Second-class postage paid at Denver, CO 80206-5800 and additional mailing offices. Postmaster: send address corrections to SECURITY at our Denver address. SECURITY copyright 1990 by Reed Publishing USA; Ronald G. Segel, Chairman and Chief Executive Officer; Robert L. Krahoff, President and Chief Operating Officer; William M. Platt, Senior Vice President. Annual subscription rates for non-qualified people: USA, \$59.95; Canada/Mexico, \$89.95; other countries, \$115 for surface mail and \$165 for air mail. Special issues, including product directory, are \$50. Except for special issues where price changes are indicated, single copies of regular issues are available for \$10, \$14 and \$18 (USA, Canada/Mexico and foreign). Please address all subscription mail to SECURITY, 44 Cook St., Denver, CO 80206-5800.

SECURITY INDICATORS

Trends and forecasts for determining loss prevention needs.

ALCOHOL- AND DRUG-RELATED TERMINATIONS

Rate of terminations per firm



Source: Merchants and Manufacturers Association

The number of alcohol- and drug-related terminations remained relatively stable between 1986 and 1989. Rehabilitation programs played a part.

DRUG TESTING

Drug-Related Terminations Stable

The number of alcohol- and drug-related workplace terminations is holding steady into the 1990s, says a recent Merchants and Manufacturers Association study.

Of 733 responding California firms, 53 percent fired between one and 10 employees because of drug use in 1989. Eighty-three percent of firms confirm positive results with a second test. Three years earlier, half of responding firms fired one to 10 employees who tested positive for drugs.

Fewer employers conducted pre-employment drug testing in 1989 — 77 percent as opposed to 84 percent in 1986. Despite the decline in testing, terminations remained relatively stable.

Jack Williams, senior staff consultant, Merchants and Manufacturers Association, tells SECURITY the drug problem is still severe, but applicants and employers are growing wiser.

"Applicants stay away from drugs before interviews because they know employers are testing. Accidents are an issue, too. As employers become more safety-conscious, they more frequently test for drugs following safety infractions. If the employee tests positive, he is not immediately fired — rehabilitation is offered," he says.

Williams cites California State Labor Code Sections 1025 to 1028, which provide employees with a one-time rehabilitation opportunity following a positive drug test. He says that as more states adopt labor codes similar to California's, drug-related terminations may be reduced.

In 1989, just 3 percent of companies that conducted pre-employment drug testing considered hiring applicants who refused to take the test. In 1986, only 5 percent would consider such an applicant.

COMMUNICATIONS

Cellular Gains Momentum

Despite popularity among security personnel, two-way radios are now challenged by a newer communications medium: the cellular telephone.

According to SECURITY's First Quarterly Telephone Survey, 60 percent of respondents say their security department uses cellular telephones. Among respondents, 73 percent use cellular phones as a replacement for two-way radios and 22 percent use them both as replacements and as an additional communications vehicle.

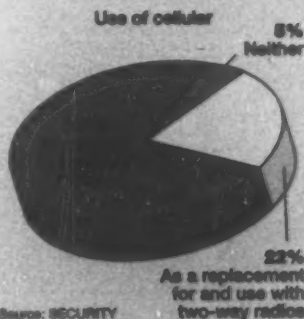
Two-way radios continue to dominate the way security communicates: 95 percent of security departments use them. All respondents in retail and financial security use two-way radios.

Despite cellular's popularity, the number of two-way radio users may hold steady if cellular buyers continue to use the phones along with two-way radios.

Of respondents, an average 33 percent plan to purchase cellular telephones in the next year. Industrial security departments are most likely to buy them. Financial security, the current cellular leader, plans the least cellular purchases.



SECURITY COMMUNICATIONS GO CELLULAR



Most cellular telephone users continue to employ two-way radio systems.

EMPLOYEE THEFT

Supermarket Employees Admit to Infractions

Arguing with co-workers, supervisors and customers is the most common supermarket employee security problem, says the London House Survey of Employee Theft in the Supermarket Industry.

Among acts committed against company policy, supermarket employees admit to arguments more than they admit to stealing food.

The study surveyed 234 randomly selected supermarket employees whose responses were anonymous. Admissions to theft factors break down as follows: 43 percent admit to cash or property theft; 39 percent to theft support, using employee discount for friends and not reporting theft by others; 77 percent to time theft; and 75 percent admit to counterproductivity.

Nearly 20 percent of respondents admit to taking cash, merchandise or property valued from 50 cents to \$50 per week. More than 10 percent admit to taking cash, merchandise or property valued at \$2 per week. Based on these admissions, the total annual cost of employee theft for a store with 150 employees comes to at least \$6,708.

Time theft is another common supermarket employee problem. Seventy percent say they arrive at work late and 17 percent have been absent with no legitimate excuse.

SUPERMARKET EMPLOYEE SECURITY PROBLEMS

Percentage of workers admitting to acts against company policy



Source: London House Inc.

Most counterproductive behavior among supermarket employees is attributed to arguments. Fewer employees admit to theft or theft support.

NEWS

Security Wrap Up: Inventory, Prisons, Schools, Credit Fraud

► The National Retail Merchants Association reports that inventory shortage held steady in department stores in 1988 at 1.94 percent of retail sales, compared to the 1987 level of 1.92 percent of sales. Shortage in specialty stores showed a sharp decline in 1988 to 1.67 percent of retail sales from 2.2 percent in 1987.

► United States corrections systems will spend over \$6.7 billion on new prison construction before the end of 1990. This money will add more than 128,000 new beds at an average cost of \$52,000 per bed, up 28½ percent from \$42,000 per bed in 1988.

► Nearly 3 million attempted or completed street crimes — assault, rape, robbery or theft — took place inside schools or on school property during 1987.

► The New York State Legislature has passed a law that makes it illegal for merchants to insist upon writing credit card numbers on customers' checks. It's possible that the credit card number might be "stolen" by a dishonest individual as it passes through the many hands of the banking system.

► To combat credit fraud, a credit authorization system with photo validation and signature verification has been developed by Sacody Technologies, Bronx, N.Y. The system can accept any number of credit cards.

COMMUNITY CONCERNS

Municipal Officials Cite Environment as Chief Problem

Solid waste and other environmental issues grab the spotlight as the biggest problems facing communities, according to a National League of Cities Survey. The study polled 314 elected municipal officials representing cities with populations of at least 10,000.

When asked to name the two biggest problems facing communities, 44 percent of respondents mentioned the environment. Crime and public safety also rank high. Drugs rank fifth at 17 percent. Crime and public safety registered eighth on the list.

Officials say the drug problem — more than any other condition — is changing for the worse: 58 percent say it has worsened, 37 percent say crime has intensified and 19 percent say poverty has become more widespread.

If given the opportunity to meet with

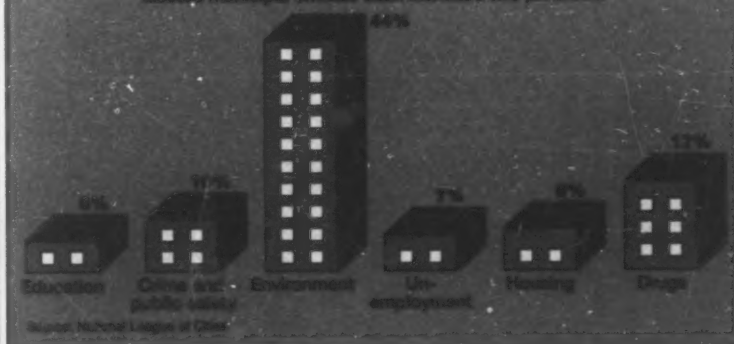
President Bush on any topic, nearly one in five officials says he would focus on drugs.

When asked about how their states respond to municipal issues, 47 percent

of officials describe relations as fair; 22 percent say they are poor. Another 28 percent say their state relations are good, and 3 percent say they are excellent.

COMMUNITY PROBLEMS THAT CONCERN OFFICIALS

Elected municipal officials each identified two problems



Solid waste and other environmental problems lead municipal officials' community concerns. Crime and public safety rank behind drugs on the problem list.

Security Talks Ethics, Business Listens

Security's emerging role in business ethics policy extends beyond investigation.

By Rebecca D. Russell
Senior Editor

James Kelly didn't hesitate. On a sweltering August day, at a nuclear reactor construction site on the Texas-Mexico border, he received a telephone call from a Congressional investigator. He was summoned to testify.

"At that moment, I made a decision and plans, knowing I would have to leave the Nuclear Regulatory Commission. I knew there would be retribution. I could see what would happen. It was like looking through a crystal ball without a cloud," he says.

Kelly and others like him hold top security posts. Yet in the course of security work they get caught up in the hazy-focus arena of ethics. These security de-

cision makers faced the ethics challenge head-on — and saw what America's fuzzy business ethics can wreak.

Some organizations continue to ignore the need for this business tenet. However, the nation's burgeoning ethics wave prompts more companies to implement programs. In one recent survey, 90 percent of 2,000 U.S. corporations had an ethics policy.

As ethics policies become more widespread, security's role increases in importance. From establishing policy to investigation, security has a leadership position.

Fueling Ethics Inspection

Kelly recently set up shop as a security consultant after 10 years as chief of security and senior inspector for the

U.S. Nuclear Regulatory Commission, Arlington, Texas.

A former assistant director of the International Association of Chiefs of Police, Kelly arrived at the NRC in 1979, where he found drug and alcohol abuse problems that created delays and flaws. Yet efforts to convince management of the need for pre-employment screening proved futile.

In the course of his security work, Kelly built cases against workers based on substance abuse. As a result, employees were arrested and taken off worksites — slowing construction and creating friction with upper management. Eventually, a Congressional committee investigating the NRC learned of the internal conflict.

When the precipitous phone call came, Kelly says he made his ethical choice. "I had to ask myself, 'Do I shoulder this alone or do I talk about the policy problems and issues?'"

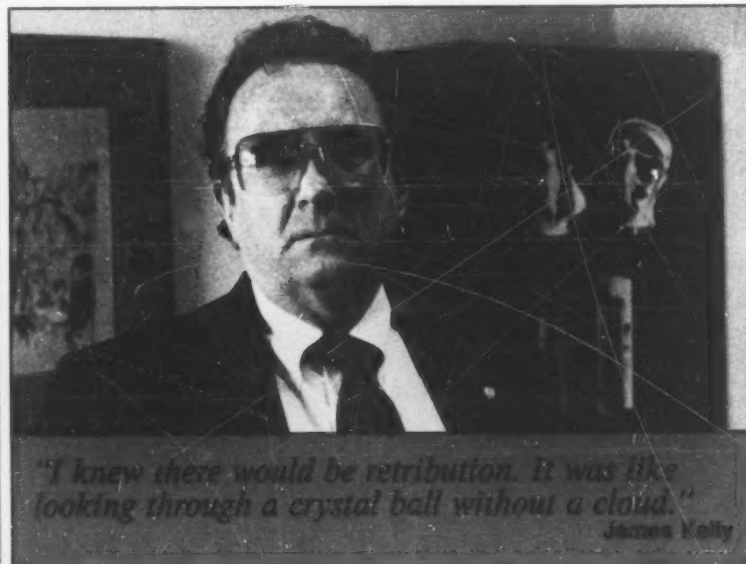
He talked. In two years of Congressional proceedings, previously thrown out or ignored cases were re-examined. Ultimately, the NRC's guidelines for a drug-free workplace addressed the issues Kelly's testimony pointed out.

While Kelly cooperated with federal authorities, NRC internal affairs began building a conflict of interest case against him. An NRC investigator found no evidence of conflict. However, that individual's superiors changed the investigator's report and attempted prosecution. Eventually, the investigator testified as to the results reported, clearing Kelly of the charge.

Security Actions Have Consequences

"I won the war and lost the battle," Kelly now says. "I fought very hard within the system to make it work."

Like Kelly, Thomas Baker's security



"I knew there would be retribution. It was like looking through a crystal ball without a cloud."

James Kelly

work led him to an ethical choice. The consequence of his action is still playing itself out in the federal courts.

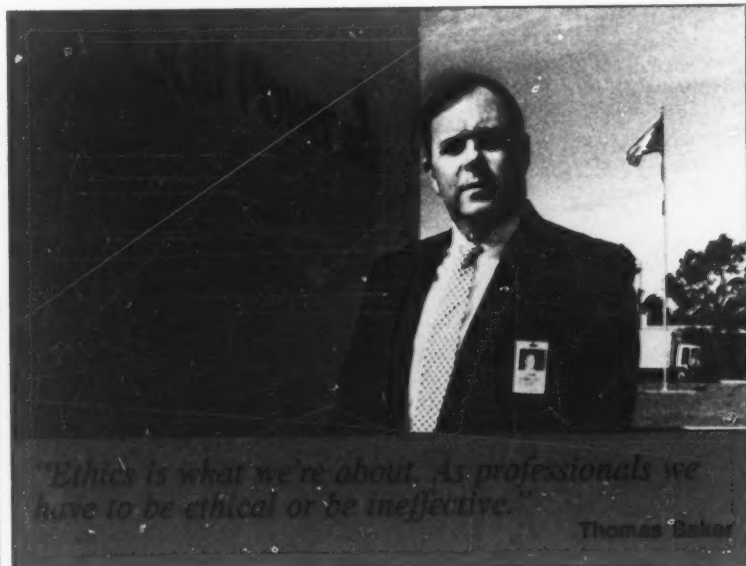
In 1984, amid myriad allegations of corruption, Gulf Power Co. brought Baker from a sister utility company, Mississippi Power, to handle an internal investigation.

"They knew I was going to do a good job investigating," says Baker, CPP, who was hired as corporate manager of security for the Pensacola, Fla.-based Gulf Power.

Investigate he did. When the company's troubles became the subject of a federal investigation, Baker cooperated under subpoena. Individuals within the organization wanted to fire Baker; instead, the company reorganized — demoting Baker and decentralizing security.

That action prompted Baker to share the results of his investigation — 37 handwritten pages — plus the story of his demotion with the company's board of directors. Another internal investigation ensued and the board recommended action.

Federal action against Gulf continues; in 1989 the company paid a \$500,000 fine for illegal political contributions. Baker's demotion was recently the subject of a federal grand jury investigation.



"The company never told me not to tell the truth," he says.

Today, in the decentralized security department, Baker is the company's resident investigator, a position he used to oversee. The Auburn University graduate and MBA candidate spends most of his time working on current

diversion programs and supervising security guards.

Ethics Policy: Job Protection?

These real life ethics dramas illustrate what can happen when security decision makers work without the protection of an ethics policy.

In fact, a written workplace ethics policy is a relative newcomer in the corporate world. Watergate and other early-1970s scandals sparked the initial policies; today's business and political scandals keep the issue in the headlines.

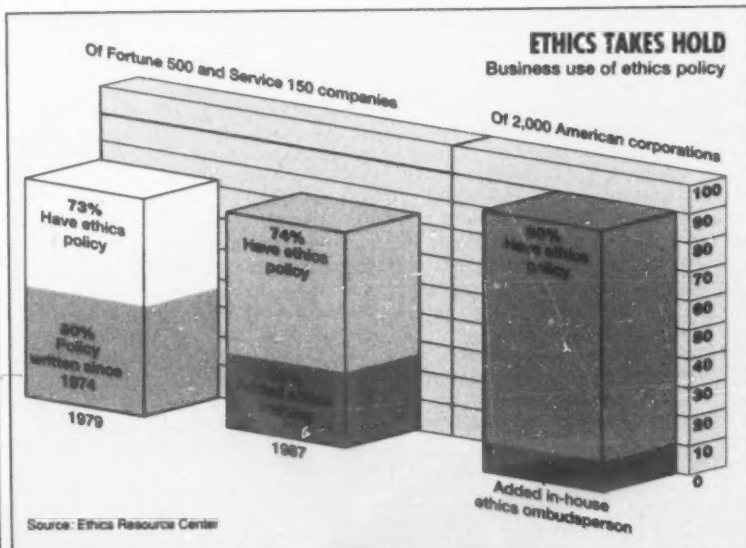
Interest has grown steadily. Gary Edwards, executive director of the Ethics Resource Center, says the Washington, D.C.-based organization polled Fortune 500 and Service 150 companies in 1979. That year 73 percent had a written code of ethics — half written in the previous five years.

By 1984, more companies had ethics codes. Significantly, Edwards says, more than one-third added training.

It's important that business recognizes differences in ethics interpretation and the need to define its stance.

"You can't hold people accountable for actions unless they know what is permissible. They must know the rules," says Jim Royer, director of corporate security, FMC Corp., Chicago.

Before FMC introduced its ethics policy, Royer says, "A lot of employees didn't know what senior management



Ethics continues to see greater acceptance as a workplace policy. Its advent requires business to address ethics-specific procedures and training.

From Establishing Policy to Investigation, Security Plays a Leading Role

stood for on ethics. Employees need to see it spelled out. They need to know what the company stands for, how they want employees to conduct business. They need to see that there must be accountability."

Nature of the Work

For most people, ethics is not an everyday issue. Yet the nature of security work forces the issue.

"Ethics is what we're about," says Baker. "As professionals we have to be ethical or be ineffective."

Security decision makers walk a thin line because of their often intimate knowledge of other departments' goings-on. When questioned about an investigation and compelled to cooperate, security employees — and all employees — need to know how management will receive their actions.

That knowledge can create a Catch-22. Says Baker, "Security is hired to be involved with critical information and fact-finding. Once you have that power, you become attractive to government investigators if your company

becomes involved in an investigation."

Ethics policy is taking root. In an exclusive SECURITY national telephone survey, 86 percent of responding decision makers say their organizations distribute an ethics policy. And 70 percent say they are in some way involved in enforcing that policy.

From industry to industry, an emerging common denominator is an ethics committee. This committee is tasked to oversee policy, hearing employee reports of ethics violations and answering questions.

An ethics ombudsperson is also growing in use. This individual — most often an employee who works in conjunction with the ethics committee — hears employee concerns. If unable to answer, this person directs questions to the ethics committee.

Security at the Helm

Security has convinced management of the need for ethics policy.

At BP America, security spearheaded the ethics effort amidst organizational changes. Building coalitions was the

Proven Effective: Ethics Resource Center

The Ethics Resource Center in Washington, D.C., helps businesses implement workplace ethics policy.

The private, nonprofit educational organization offers learning materials to businesses and schools. From workshops to research studies

and national conferences, the Center helps organizations define and communicate ethical standards to employees.

More than 500 companies use the Center's 30 videotapes. Available for rent or purchase, tape topics cover general business conduct and industry-specific issues.

Surveys track national ethics interest and can provide insight into business needs. The Center also co-sponsors conferences at universities to increase management awareness of the ethical dimensions of business conduct and to solidify organizational standards.

Through its work with school children, the Center urges early ethics education. The "Ethics for Life" series of videos helps teachers develop values in students, beginning at 4 years of age.

For more information, contact the Ethics Resource Center, 600 New Hampshire Ave., NW, Suite 400, Washington, D.C. 20037; phone (202) 333-3419.

A video, "Conflicts of Interest in the Workplace," helps businesses tell employees about ethics policy.

SECURITY AND ETHICS

Of security decision makers



Source: SECURITY

Ethics catches on: Where policy exists, security is in some way involved in enforcement.

first step, says Don Duckworth, former director of corporate security who helped launch the program.

"While security may not head up an ethics project, security can provide good input, drawing on investigative abilities," says Duckworth, now vice president of human resources and administration.

Employees receive a policy statement and employee handbook. Initial orientation included videos and small group meetings to explain the conflict resolution process.

Jim Royer spent two years convincing FMC Corp. management of the need for a policy. Once drafted, legal and human resources helped security solidify the program. In 1986, the company-wide policy went into effect.

Today, every employee sees the ethics statement and receives a manual. Managers and executives sign off on the document, agreeing to abide by it. A toll free, incentive free Ethics Line receives tips of unethical behavior.

FMC's Ethics Oversight Committee's members are not company employees and report to the board of directors. After hearing ethics concerns, the committee directs criminal issues to security.

"Is security the ethical conscience of a company? I don't think so. We enforce the decisions of other people," Royer says.

Security reports to the EOC at a predetermined point. Investigations are

never terminated, Royer says. "Once we start, we play it to the end. We present the facts to senior management. They decide what to do with it."

Unethical Behavior Hits Home

With an ethics policy in place, one security department can attest to its usefulness. It became instrumental when unethical behavior hit home—in the security department.

John S. Martinicky, now manager of corporate security for Navistar International Transportation Corp., was a newcomer to the company's security staff in 1986. Shortly after arriving, he and other staff members suspected the department head of embezzling funds through security operations.

Thanks to the company's well-defined policies, the staff knew what to do. They followed the company's guidelines: Bring information to senior management and work with them to draw up a plan of attack. Then an investigative review committee—with representatives from legal, audit and the controller's office—decides the direction the case should take.

Security staff members, auditors and internal investigators gathered evidence in cooperation with local law enforcement and the company's general counsel. The former security manager confessed to fraud and embezzlement and was convicted of criminal and civil charges. Sentencing included jail time and restitution.

Martinicky stepped in to rebuild the department's reputation. "We set up programs that provided a new direction for the department to add credibility," he says.

"This case was the inability of one person to maintain a level of trust," Martinicky says. "It took a lot of support from senior management to rebuild trust and confidence in our efforts."

An established and publicized ethics plan made that positive interaction possible. Security knew where it stood with management.

Clearly, ethics policy has a place in business. Security's importance is recognized, says well.

"Security's role is increasing in importance as security becomes more recognized," Edwards says.

That earned recognition places security in a position to ignite positive change. □



Industry Standards Provide Enforcement

Security industry association participants do have recourse when ethics issues arise.

The American Society for Industrial Security (ASIS) adopted a six-point code of ethics for its members to follow in the course of their security work. It "mandates its conscientious observance as a binding condition of membership in or affiliation with the Society."

Current ASIS Chairman of the Board Brian Hollstein says, "A large percent of this industry's members have been through other lives before they came to security. There's a certain amount of weeding out of bad hats, the people that are unable to hue to an organization's requirements." Hollstein is corporate security manager, Xerox Corp., Stamford, Conn.

If a member has an ethical question or allegation, it first goes to ASIS headquarters, says Jim Jessee, chairman of the Ethical Standards committee. The executive vice president refers allegations to the committee, which then investigates.

"It's becoming more of a

concern," says Jessee, director of corporate security at Procter & Gamble Co., Cincinnati. Penalty for unethical behavior is censure, suspension or expulsion, he says.

To better gauge industry interest in ethics, ASIS will include an ethics session at this year's convention, Jessee says.

Independent industry associations also adopt codes of ethics. The International Association of Professional Security Consultants' code covers professional standards, including forensics; violation leads to formal reprimand or suspension.

Dan Bunch, chairman of the National Council of Investigation and Security Services (NCISS), says ethics is a "membership criteria."

Members must adhere to different licensing requirements for each state. Therefore, Bunch says making an ethics rule applicable to 50 different states is impossible.

"We try to control ethics via the state licensure procedure," he says. "When we approve new members, they must show proof of licensure from their state."

SECURITY

THE MAGAZINE FOR SECURITY DECISION MAKERS

Law & Order & Security

Gauging Your
Return on
Investment

Cellular
On the Job

Equipment Focus:
CCTV Savings With
Time Lapse Recorders

Lawson Lamar
State's Attorney
Ninth Judicial Circuit of Florida

Harvey E. Morse
President
Morse Security Group Inc.



SECURITY^{T.M.}

THE MAGAZINE FOR SECURITY DECISION MAKERS

A CAHNERS PUBLICATION/VOLUME 27, NUMBER 6/JUNE 1990

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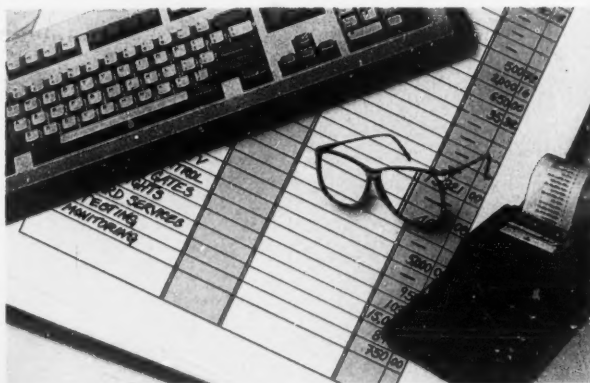


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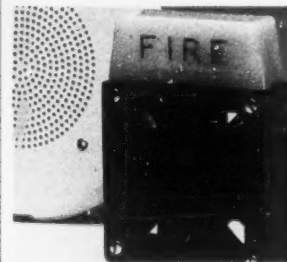
Lawson Lamar, state's attorney, Ninth Judicial Circuit of Florida, and Harvey E. Morse, president, Morse Security Group Inc., combine efforts to improve public and private security.

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SECURITY (ISSN 0890-8826) is published monthly, except for March and August when two issues are published in national and separate editions, by The Cahners Publishing Company, A Division of Reed Publishing USA, 275 Washington St., Newton, MA 02158-1630. Terrence M. McDermott, President; Charles E. Moodhe, Senior Vice President/General Manager; Chicago Division: Jerry D. Neith, Senior Vice President/Publishing Operations; J.J. Walsh, Senior Vice President/Finance; Thomas J. Dellamaria, Senior Vice President/Production and Manufacturing; Ralph Knupp, Vice President/Human Resources. Circulation records are maintained at Cahners Publishing Company, 44 Cook St., Denver, CO 80206-5800. Phone: 303/388-4511. Second-class postage paid at Denver, CO 80206-5800 and additional mailing offices. Postmaster: send address corrections to SECURITY at our Denver address. SECURITY copyright 1990 by Reed Publishing USA; Ronald G. Segel, Chairman and Chief Executive Officer; Robert L. Krakoff, President and Chief Operating Officer; William M. Platt, Senior Vice President. Annual subscription rates for non-qualified people: USA, \$59.95; Canada/Mexico, \$89.95; other countries, \$115 for surface mail and \$165 for air mail. Special issues, including product directory, are \$50. Except for special issues where price changes are indicated, single copies of regular issues are available for \$10, \$14 and \$18 (USA, Canada/Mexico and foreign). Please address all subscription mail to SECURITY, 44 Cook St., Denver, CO 80206-5800.

SECURITY INDICATORS

Trends and forecasts for determining loss prevention needs.

SALARIES

Security Salaries: Experienced, Degreed Decision Makers Reap Highest Reward

Location, employer, company size, experience and education — these factors determine how much security decision makers earn in a year.

The sixth annual security/loss prevention survey by Abbott, Langer & Associates, Crete, Ill., finds that average yearly salaries for jobs ranging from security director to security officer vary by nearly \$40,000.

Survey results show that security directors and managers with the highest annual incomes — earning in excess of \$150,000 per year — are located in Los Angeles, New York City, Boston, San Francisco, the mountain states (excluding the Denver area) and Dallas/Fort Worth. The highest-paid security employees work for companies with 25,000 employees or more and have at least 25 years of experience, a graduate degree and the Certified Protection Professional (CPP) designation. Secu-

rity directors and managers with policy-making authority who work for manufacturing organizations earn more than 17 percent more than their non-manufacturing counterparts.

The average salary for security directors and managers with policy-making authority is \$52,291, more than 9.6 percent higher than the average last year. The CPP designation is a ticket to at least 26 percent more money.

For security directors and managers without policy-making authority, the average income is more than 30 percent lower, \$40,175. At the low end of the income spectrum, unarmed guard and security officer incomes average \$14,957.

For policy-making security directors and managers with one or two years of experience, salaries average \$31,693; for those with 25 or more years of experience it rises to \$58,759.

AUTHORITY EARNS MORE THAN RESPECT

Average annual salary

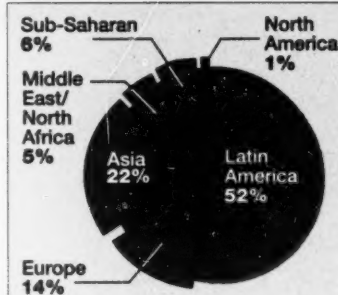
Security director/manager with policy-making authority	\$52,291
Security director/manager without policy-making authority	\$40,175
Investigator	\$29,438
Supervisor of guard operations	\$23,727
Armed guard/security officer	\$18,956
Unarmed guard/security officer	\$14,957

Source: Abbott, Langer & Associates

Policy-making security directors fare best on the security pay scale. Salaries for security directors who don't set policy increased more than 12 percent in 1990.

TERRORISM HITS BUSINESS

Incidents by region for 1989



Source: Business Risks International

Of 1,371 terrorist attacks against business, 717 were in Latin America.

TERRORISM

Business Provides Attractive Target for Terrorists

American businesses abroad are at risk for violent attack from terrorism and political instability, according to Business Risks International, Nashville, Tenn.

Terrorist incidents against business increased 12 percent in 1989, making business the leading target for terrorists — surpassing diplomatic, police, military and government properties and personnel — for the sixth straight year. Businesses worldwide experienced 1,371 terrorist incidents in 1989. Twenty-nine attacks — most in Latin America — were registered against American businesses.

Gene Mastrangelo, BRI's Risk Assessment Information Service manager, tells SECURITY, "Terrorists rarely act on impulse. If they notice a security presence at Company A, they'll go on to Company B or an easier target rather than risk failure or capture. Sophisticated business security will intimidate most terrorists."

Mastrangelo says American high-tech or defense-related companies, banks and businesses that extract oil or minerals from their foreign locations are the most attractive terrorist targets.

SCHOOLS

Schools: Leading Site for Theft, Vandalism Incidents

Theft and vandalism incidents account for an increasing percentage of police apprehensions, according to Sonitrol Corp., Orlando, Fla., a security product manufacturer and monitoring and dispatch service. Sonitrol links schools' growing inventory of the latest PC and audio-visual equipment to the increase in school crime.

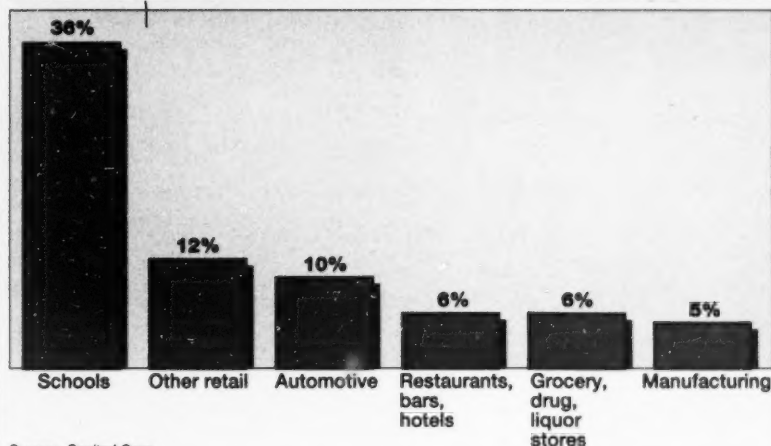
Sonitrol's 1989 apprehension summary registers the most incidents — 36 percent — at schools. All other business types, including auto dealerships and supply stores and assorted retail establishments, rank far below in incident frequency.

Bruce Winner, manager of Sonitrol's Educational Security Program, says the high percentage of school incidents is noteworthy, considering that schools account for just 11 percent of the company's account base.

"As school typewriters are replaced by PCs, crime and theft at schools increase," Winner tells SECURITY. "Arson increases, too, because kids who break into the schools start fires to try to cover their tracks."

POLICE FREQUENT THE SCHOOLS

Apprehensions by business type following Sonitrol dispatch



School incidents prompted the most police apprehensions following Sonitrol dispatches in 1989. New PCs and VCRs attract an increasing number of vandals.

Most of those apprehended at schools are minors, Winner says. Peer pressure plays a part; an average 2.13 people are apprehended per incident.

"School security is a growing issue, especially during new construction

stages," Winner says. "Intrusion and fire detection are now built into new schools, and existing schools are installing intrusion detection."

Sonitrol estimates school vandalism losses at \$1 billion annually.

GUN CONTROL

Gun Owners Favor Seven-Day Waiting Period for Buyers

On April 24, 1990, a man killed one person and wounded four others when he opened fire in a shopping mall near Atlanta, Ga. Released from a local mental hospital a day earlier, the gunman purchased the weapon at a pawn shop that same day.

Are more restrictive handgun laws the solution to such incidents? Handgun owners think so. Most support tougher handgun legislation, says a Time/Cable News Network survey of 605 firearms owners.

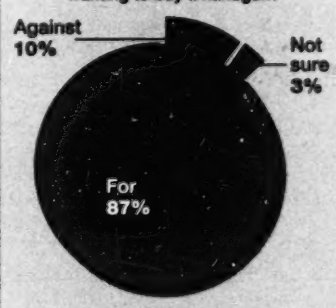
Seven in eight gun owners — 87 percent — favor a federal law which would require a seven-day waiting period and background check for potential handgun purchasers.

The dispute over waiting periods and background checks for prospective gun owners continues on national and state levels. Buyers are subject to waiting periods in some states depending on the type of gun sold. In addition, not all states run background checks during this interval.

The "point-of-sale system," which would allow gun dealers nationwide to

HANDGUN WAITING PERIOD GAINS SUPPORT

Question: Are you for or against a federal law requiring a seven-day waiting period and a background check for anyone wanting to buy a handgun?



The majority of gun owners favor point-of-sale background checks.

check for convicted felons, is under criticism because of gaps in FBI and state recordkeeping of criminal convictions. The FBI's National Crime Information Center currently holds more than 20 million records on criminals and missing persons.

NEWS

Security Wrap-Up: Cellular, Biometrics, Discharge Suits

► A growing number of drug dealers use mobile telephones and electronic pagers to keep their businesses running. Proposed legislation would give lawmakers the clout to discontinue mobile telephone and pager service for suspected drug dealers if a judge determines a cause for termination.

► Kansas City-based US Sprint Communications Co. says some customers will be able to place long-distance phone calls with their voices this summer. The new service will be targeted at business travelers and will allow the caller to use spoken words instead of dialed numbers. The voice-activated dialing service will be secured with a biometric verification of an initial password or phrase and will eliminate the need for a plastic calling card.

► Nearly 40 percent of wrongful discharge suits in 1989 resulted in cash settlements paid to fired employees. The settlements ranged from \$10,000 to \$100,000, excluding legal fees and disregarding the reason for firing. The fastest-growing cause for dismissal is substance abuse.

SECURITY COSTS AND THE...

Return on investment extends beyond dollars and cents.

By Rebecca D. Russell
Senior Editor

Security operations now confront a threatening squeeze from downsizing, profit center doctrine and quick return thinking. To bolster senior management support, security decision makers have taken the offensive.

Always more than just a cost center, security — according to top practitioners and consultants — contributes to bottom line profitability.

Security is tangible. Traditionally viewed as locks, alarms and guards, security's tangible benefits keep people out, signal emergency response and send a security-conscious message.

Security is also intangible. Contemporary programs promote business gains in the form of employee comfort, customer satisfaction and even revenue generation.

Members of this nearly \$40 billion industry are growing out of their law enforcement uniforms into business suits. Chief executives increasingly find

security professionals adeptly joining security needs with bottom line goals.

Security's Changing Business Climate

A changing business climate finds security on course to protect assets — amid evolutions that trigger expanding possibility or diminishing opportunity.

Business climate affects security, say nearly three of four decision makers in SECURITY's annual Forecast study. Developments with the most positive influence in 1988 were mergers, acquisitions, facility expansion, employee pool growth and new product introductions. Negative developments include labor shortages, sales decline, layoffs, facility shutdown and asset divestiture.

Generally, the effect of these developments on security operations is favorable. In a national survey of security decision makers, 59 percent say downsizing and reorganization do not adversely affect security's performance. When good things happen for business, good things happen for security. With more money to work with, growth is possible; program expansion and additions, equipment upgrades and additions, and staff increases result.

Security's growth and business operation increasingly relate to financial goals for both the company and security

department. Sixty-nine percent compare costs with company financial goals. Use of a security department business plan is catching on; 44 percent say they use such a plan.

How do these factors translate to security's bottom line? When asked to identify assets returned or not lost for each \$1 spent on security, two-thirds of respondents recovered or did not lose between 5 and 49 cents. And 20 percent say assets returned or not lost equal \$1 or more.

Selling the Expenditure

Just as it's tough to place a dollar value on security, pinpointing security payback is also tricky.

Doing business requires justifying expenditures. For security, that often translates to justifying existence.

Enlightened management recognizes

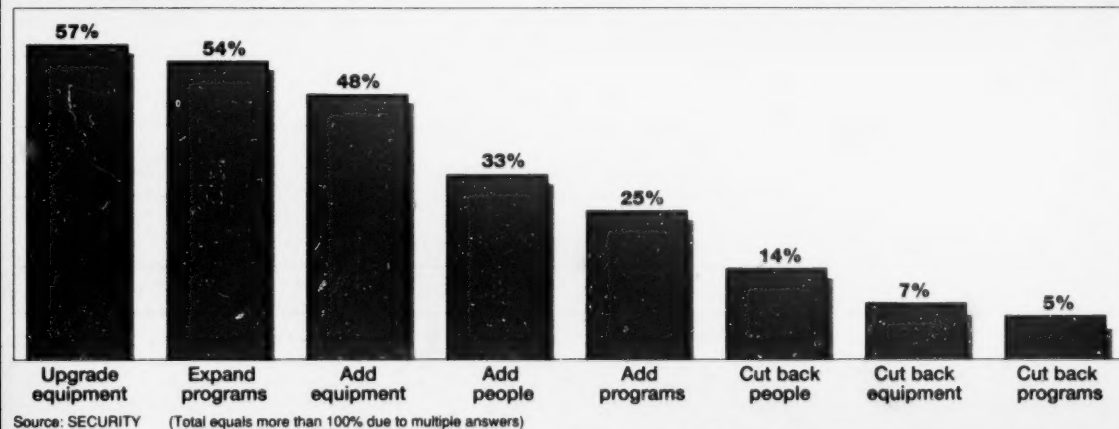
BOTTOM LINE



Security sees change for the better.
Expanded resources reflect increasing
confidence in security's efforts.

BUSINESS DEVELOPMENTS FORCE CHANGE

Business climate affects security work



the need to continue security, even when it appears losses have been contained. Effective security controls losses, in turn creating the impression that a problem has been solved. A more important message is that security is doing its job — even more reason to maintain this important department.

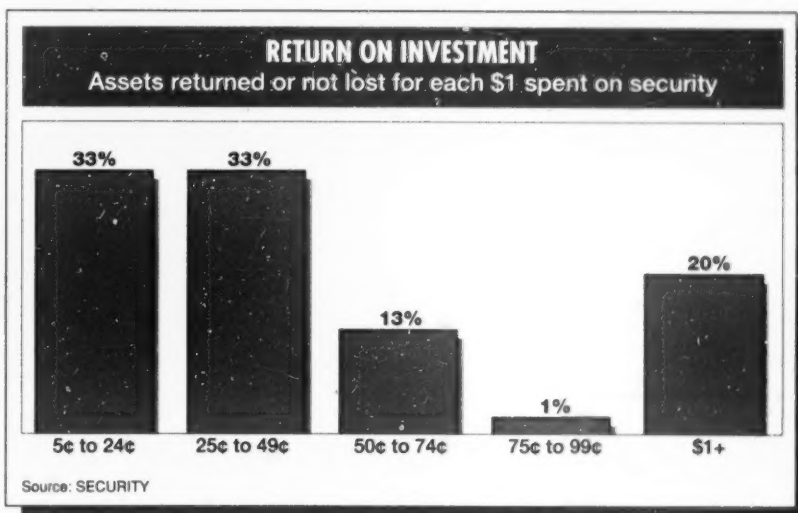
"That security is in the company presupposes that management realizes there are problems that need to be addressed — and that they are willing to make that cost expenditure," says Rick Lew, security director, Greyhound Corp., Phoenix, Ariz.

When tapped to prevent losses, it's tough to quantify assets not lost. "You can't put a dollar value on that which has not occurred," says David Berger, a Los Angeles-based consultant.

Taking action before something happens is the preferred approach — and a challenge. The problem-solution tack — threat analysis to security decision makers — forms the cornerstone of many security efforts.

Solving Problems

Security can identify the probability of a problem hitting home by looking at warning signs. By examining a problem within an organization, then comparing that with the neighborhood, similar organizations and national trends, security can show how systems and procedures beat the challenge, pre-



Gauging return on investment in dollars and cents can be tricky; various methods help security show its bottom line worth to the company.

vent losses and protect employees.

"You have to be able to show management that there is a more serious problem than it appears on the surface," says consultant John Case, president, John D. Case & Associates, San Diego, Calif.

When seeking senior management support for a project, Greyhound's Lew takes the opportunity to educate management about security's abilities.

"Operating managers have different perceptions of security," he says. "They think of it in elemental terms such as guards and locks. They don't think of procedures, staffing and patrols. Tell them why you need it and the problems you are addressing."

His cost to benefit evaluation includes defining the problem and providing three solution scenarios, each with different costs. "This is the way

Department Overhaul Trims Budget, Increases Return

Problems: Antiquated and inoperable alarms, overstuffed security officer force.

Solutions: Decentralize security, automate and add equipment where possible, reduce officer staff and increase pay, add a central station.

Payback: \$450,000 the first year.

After years of spending \$1.2 million for guard-dominated services, Cosmair Inc., Clark, N.J., now budgets one-third that cost for security.

"It was as simple as dollars and cents," says Randy Timari, corporate security director for the subsidiary of Paris-based L'Oreal cosmetics.

Timari cut security officer spending from more than \$1.1



As part of a department overhaul, security added equipment, automation and a central station.

million to \$400,000. After replacing and upgrading equipment, the company saved more than \$450,000.

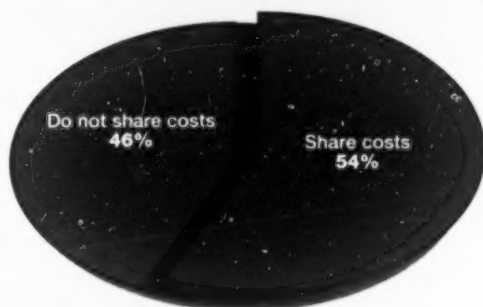
Decentralized management gives security time to investigate cases and design new services. Each site manager is better equipped to make decisions. And employees are more involved.

Timari says senior managers approved the security revamp; he then showed the return for each equipment change.

"We also discussed what to expect with the change," Timari says. "I expected some increase in petty theft. But we actually saw a decrease because management in each building feels more responsible for security in each area."

SHARING TO CUT COSTS

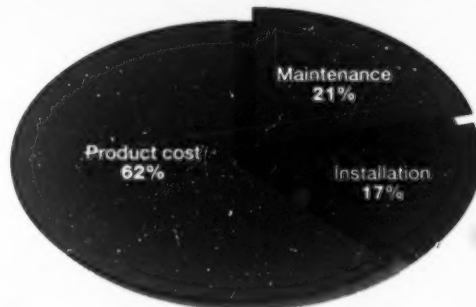
Decision makers share project costs



Source: SECURITY

EXPENDITURE BREAKDOWN

How each equipment dollar is invested



Source: SECURITY

Of those sharing costs, 53 percent do so to reduce operating costs, 23 percent to consolidate departments.

Nearly 75 percent of security decision makers seek bids for higher priced equipment from an average of three sources.

you can have security," Lew tells management, "this is what it will take to stop this problem."

Providing, Sharing Solutions

After winning ideological and financial support, where does the money go? The bulk — and always rising — goes to personnel and overhead, tagged at 36 cents for every dollar spent in security for 1989. The second largest

expenditure is for services at 27 cents. Maintenance and repair eats 16 cents of each dollar; replacements tally 9 cents. New equipment costs 12 cents.

For each dollar spent on new product purchases, 62 cents goes toward purchase cost, 17 cents to installation and 21 cents to maintenance.

For the important maintenance expenditure, 65 percent do factor it into cost proposals. Nearly three-fourths

seek bids for higher priced equipment and services, contacting an average of three sources.

Being involved in project planning helps a business realize the full potential of equipment. That way it's easier to beat obsolescence or neglect.

Yet security does not absorb costs alone. Many projects overlap with other departments, from public relations to building maintenance, so security

Sharing Cost Delivers Payback

Problem: Ineffective communication with security departments and employees in various offices.

Solution: Security newsletter.

Payback: Awareness, reporting and communication.

"Secureview: Your Security Connection" puts Michigan Bell security in touch with more than 6,000 employees.

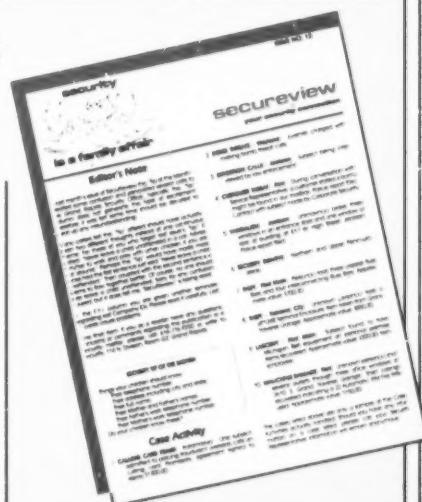
"When I came to this job from another department, I didn't know how much people within the company relied on us. I knew other employees were lacking the information too," says Terrence Mulvihill, corporate security director for Michigan Bell's outstate area (offices outside Detroit).

In addition to acquainting employees with what security does, the newsletters solicit referrals and feedback. An alert about prisoner fraud brought in tips from employees on stopping the trend.

It has also helped change the department's image. "People always thought if a security person was around, something was wrong," Mulvihill says.

Each month's newsletter alerts offices to cases under investigation. Security tips, questions and answers, and an information column enhance employee knowledge of security.

Several departments share project cost. Mulvihill writes the newsletter; in-house graphics and printing departments produce each issue.



Newsletter delivers returns in awareness and communication.

COMPANY FINANCIAL GOALS
Comparing costs with company goals



Source: SECURITY

SECURITY'S BUSINESS GOALS
Managers using a long range business plan



Source: SECURITY

Security department bottom line vision is increasingly complemented by attention to the company's goals.

More security departments are using a business plan to help evaluate expenditures and returns.

shares responsibility for protection.

A majority, 54 percent, say they do share costs. Of those that share, 54 percent do so to reduce operating costs, 23 percent to consolidate departments.

Verifiable Returns

At Chrysler Corp., Detroit, each department contributes to security's costs, including security officers. An ongoing upgrade, adding turnstiles at manufacturing sites, reduces each department's assessment and improves security.

"We see tangible results," says Alex Tarnavsky, Chrysler security systems engineer.

The turnstile/computer interface upgrade enables security, personnel and foremen to handle, more than ever, duties from tracking worker shortage and surplus to changing access status.

It's smart business to examine the costs associated with duplicated efforts, says Dennis Dalton, president, Dalton Affiliates Ltd., Fremont, Calif. It may reveal waste in spending that could be put to better use elsewhere.

Preventing loss is an ideal. Yet loss is a constant of business life that requires security action.

At Dow Jones' Princeton, N.J., facility, vandalism and theft of employee vehicles from the company parking lot put security on the offensive. With 800 employees on site each day, the company and security faced negative internal publicity. Security took the initiative and looked at the cost and return

Improved Perception Yields Customer Benefits

Problem: Remote parking creating negative sentiment among customers.

Solution: Care-A-Van, a shuttle bus service for patients and visitors.

Payback: Improved image of facility and its services.

In a departure from traditional security tasks, the security team at Floyd Memorial Hospital, New Albany, Ind., solved a growing image problem for the facility.

Construction pushed convenient parking out of the picture. Security, led by Bob Trinkle, security director, spearheaded development of a

shuttle bus service. People surveyed expressed interest in such a service.

Trinkle proposed to staff the bus with high school students who would serve as drivers in exchange for a college work scholarship.

Proposed expenditures included the cost of buying a used bus, a complete maintenance schedule, statistics on mileage and gas use, plus a breakdown of costs associated with the scholarship.

Security shares the cost of the program with administration; security picks up 70 percent and administration 30 percent.



An efficiently executed shuttle bus service reaped public relations returns for Floyd Memorial Hospital.

SPECIAL REPORT: RETURN ON INVESTMENT

for control gates. Installed two years ago, no cars have been vandalized or stolen since.

"The payback is employee comfort and satisfaction," says John Rosco, Dow Jones security manager. He calculated return on investment based on the average loss to employees; payback to the company will take 10 years, he says.

There are measurements of worth and a job well done beyond dollars and cents.

Russell Colling, director of security and transportation, Hospital Shared Services, Denver, says return in the form of intangibles can affect the bottom line. It can be quantified: When employees do not feel safe and secure

in the workplace, job applications can fall — especially true in the labor-short hospital market, he says. Then the organization has to pay more to keep people, which affects business goals.

"It's a feeling and perception as much as reality," Colling says.

This translates to customer or patient satisfaction as well. Comfort, plus a feeling of safety, "are measurements that management can use to see return on investment."

Looking beyond short term paybacks has its own returns. Remembering the importance of security's long term efforts — in quantifiable returns and intangibles — reflects a realistic perspective of security's worth. □

Downsizing Forces Cutbacks, Re-Evaluation

Problem: Downsizing-imposed department spending cuts of more than \$350,000.

Solutions: Revamp security officer tasks, re-evaluate some positions.

Payback: Continued quality service for less money.

SECURITY's annual Forecast study shows that program, equipment and staff cuts affected nearly 27 percent of decision makers last year.

Tim Clayton, plant protection and facility safety manager for seven AT&T Bell Laboratories locations in central New Jersey, faced that challenge in a big way when he had to cut back more than \$350,000. He is responsible for large sites and a total employee/visitor population of 11,000.

Clayton first met with security team members — management and clerical staff, plus officer supervisors — to build understanding and support.

"Our highest priority was not to lose our valued officers through fear. We 'guaranteed' that no one would be laid off while downsizing," Clayton says.

Security cut its costs by \$367,260 by eliminating officer posts at specified times, shifting those officers to other posts. In one office, security worked with managers there, who agreed to limit some



office hours. That enabled security to reposition one officer. At another site, security now shares a position, which eliminated one safety clerk.

In addition, guard tours were spread out when feasible. One of several parking lot officers also left with minimal impact, Clayton says.

Close work between the contract guard company and Clayton's forces enabled security to extend the contract by nine months and reduce total hours worked.

The department also spent money to save money. At one building, one officer watched an entrance and another took 20 minute tours. For a quick return on investment, security locked the door and installed a \$4,000 door bell — saving \$45,760.

"We are being flexible as we go along," Clayton says. "If we cut too deep, we will make adjustments. We will continue to look at each new cost containment idea."

Civil Recovery: Time Well Spent

Problem: Managers spending too much time in shoplifter prosecution.

Solution: Civil recovery.

Payback: Five weeks on initial investment.

At Eckerd Drugs, improved shoplifter detection required more court time of store managers.

"The manager has a set amount of hours to operate a store. We can't afford 2 to 2½ hours with every case," says Mickey Carter, director of loss prevention for the



At Eckerd Drugs, civil recovery helps managers spend less time on security, more on managing.

Clearwater, Fla.-based chain.

Civil recovery is the store's cost effective tactic. "We're in it to deter, to prevent shoplifting and to save the manager's time," he says.

Security created a job to oversee the company-wide program and invested in a personal computer. One management concern was adverse publicity and public reaction; awareness and explanation kept that problem away.

Payback in strict dollars and cents, Carter says, came in five weeks. And people take the store's policy seriously: There have been only six cases of recidivism in two years.

A CAHNERS PUBLICATION / JULY 1990

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**CCTV
BONUS
REPORT**
Technology, Connections and More

SECURITYTM

THE MAGAZINE FOR SECURITY DECISION MAKERS

Details on
ISC East/
New York
Inside!

Security's Low-Threat Diet

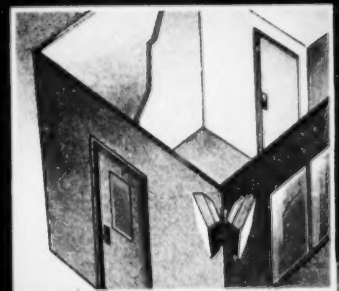
Latching on to
Keys and Locks

New Player Joins
Monitoring Market

Equipment Focus:
Security Officer
Enclosures

Dennis Olson

Director of Corporate Security
and Transportation Services
The Quaker Oats Co.



SECURITY^{T.M.}

THE MAGAZINE FOR SECURITY DECISION MAKERS

A CAHNERS PUBLICATION/VOLUME 27, NUMBER 7/JULY 1990

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SECURITY (ISSN 0890-8826) is published monthly, except for March and August when two issues are published in national and separate editions, by The Cahners Publishing Company, A Division of Reed Publishing USA, 275 Washington St., Newton, MA 02158-1630. Terrence M. McDermott, President; Charles E. Moodhe, Senior Vice President/General Manager, Chicago Division; Jerry D. Neth, Senior Vice President/Publishing Operations; J.J. Walsh, Senior Vice President/Finance; Thomas J. Dellamaria, Senior Vice President/Production and Manufacturing; Ralph Knupp, Vice President/Human Resources. Circulation records are maintained at Cahners Publishing Company, 44 Cook St., Denver, CO 80206-5800. Phone: 303/388-4511. Second-class postage paid at Denver, CO 80206-5800 and additional mailing offices. Postmaster: send address corrections to SECURITY at our Denver address. SECURITY copyright 1990 by Reed Publishing USA; Ronald G. Segel, Chairman and Chief Executive Officer; Robert L. Krakoff, President and Chief Operating Officer; William M. Platt, Senior Vice President. Annual subscription rates for non-qualified people: USA, \$39.95; Canada/Mexico, \$89.95; other countries, \$115 for surface mail and \$165 for air mail. Special issues, including product directory, are \$50. Except for special issues where price changes are indicated, single copies of regular issues are available for \$10, \$14 and \$18 (USA, Canada/Mexico and foreign). Please address all subscription mail to SECURITY, 44 Cook St., Denver, CO 80206-5800.

SECURITY INDICATORS

Trends and forecasts for determining loss prevention needs.

SECURITY SURVEY

Security Decides on New Products, Gains Specification and Purchasing Leverage

Security decision makers directly influence the majority of their organizations' product and service purchases, says SECURITY's Second Quarterly Telephone Survey.

Survey results reveal that on the average, security decision makers directed 72 percent of 1989 security purchases. Those who work in finance most likely direct all security purchases.

Those who work for the government have the least say when it comes to purchases. Just 8 percent directly influence security purchases.

As the diversity and number of security products grow, so does security's purchasing influence. Among respondents, 87 percent say their direct involvement in product and service specification and purchasing is increasing. Those who work for institutions have the

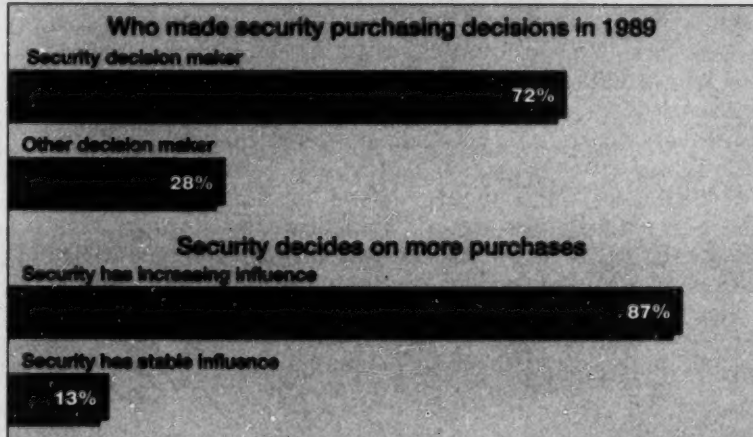
most leverage: 96 percent say their purchasing involvement increases as the number of security products and services increases. Retail also scores high, with 92 percent of respondents exercising greater purchasing power.

The telephone survey also shows that the frequency of security incidents in the second quarter remained stable for more than half of respondents. SECURITY's quarterly tracking question, "Has the number of security incidents increased, decreased or remained the same over the past three months?" shows that 27 percent experienced an incident increase in the second quarter, a 10 percent drop. Incidents hit retail hardest, with 50 percent citing an increase in the second quarter.

For more on security incident tracking and an introduction to SECURITY's new Business Crime Index, turn to ENDPIECES.



SECURITY'S PURCHASING INVOLVEMENT STRENGTHENS



Security directly influenced most purchases of security products and services in 1989. Security's influence grows as new products and services are introduced.

SECURITY'S BUYING HABITS



Brand selection influences where security shops for products.

PURCHASING

Brand Loyalty Steers Buyers

Just as consumers frequent specific supermarkets to find their favorite brands, security decision makers go out of their way to buy brands they trust.

According to SECURITY's Second Quarterly Telephone Survey, 59 percent of respondents say brand selection influences where they buy security products. Industrial respondents most likely search for preferred brands.

Where does security turn to buy products? Dealers attract the most buyers. Nearly half of respondents' security purchases in the last year — 49 percent — were chosen through a dealer. Security buyers from institutions most often shop at dealers. Retail security most likely buys from distributors, and government security turns to manufacturers for more than half of purchases.

PUBLIC OPINION

Safety-Minded Consumers Seek Security Tools

Security officers, police and technology aside, consumers feel responsible for their own security. So says "The Security Crisis in America: What Americans Are Worried About," a survey to be released in August by the Consumer Network. The Philadelphia-based organization's survey represents a national cross-section of supermarket shoppers.

Among survey respondents, 87 percent say they feel responsible for their own security. More than half — 57 percent — say police share this responsibility, but only 44 percent agree that police come quickly when called.

Consumers are very concerned about drug use by security personnel. Seventy-nine percent strongly agree that people responsible for the safety of others should be tested for drugs, even if employee privacy is compromised. However, 79 percent say their personal privacy is compromised by growing demands for personal information.

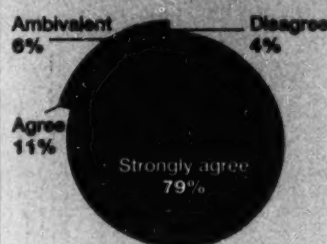
Visible security technology makes consumers feel safer, the survey finds. Two-thirds of respondents feel more comfortable making transactions at ATMs that feature CCTV cameras. Safety in numbers is also a factor: 44 percent are sometimes afraid to use ATMs if no one else is around.

Respondents overwhelmingly agree that smoke detectors make them feel safe; 99 percent of those under age 35 give them high marks of approval.

Mona Doyle, president of the Consumer Network, says that the market for high-tech security equipment will grow tremendously as people decide to take security into their own hands.

"The market for security equipment will explode due to the widespread acceptance of high technology among younger people," Doyle says. "Population demographics and high concern about security will feed the very large market for new devices."

PUBLIC OPINION: TEST SECURITY FOR DRUGS



Source: Consumer Network Inc.

The safety-conscious public agrees that security personnel should be tested for drugs.

NEWS

Security Wrap-Up: White Collar Crime, Robbery

According to several sources of national statistics, white-collar arrests have surged between 48 percent and 300 percent since 1971 and account for more than one-quarter of case filings in the U.S. District Court. Street crime costs about \$12 billion a year, but executives and store clerks steal between \$40 billion and \$200 billion annually.

New York City has surpassed Detroit as the robbery capital of the United States. New York City saw 1,271 robberies for every 100,000 people in 1989, one every six minutes. Detroit had 1,095 and Washington, D.C. reported 1,055. Demand for guns and bullet-proof clothing rose in 1989.

U.S. officials installed the first plastic explosives detector in a foreign airport in time for the summer travel season. The location: London's Gatwick Airport.

Despite political changes in Eastern Europe and improved relations with the Soviet Union, the U.S. government's list of hostile or "designated countries" remains unchanged.

In 1989, 32 percent of America's largest companies required drug tests for all new employees, and 14 percent required alcohol tests. In 1990, 47 percent test for drugs, and 25 percent test for alcohol.

MARKET FOCUS

Sensors Lead Fire Detection Equipment Sales in 1989

Total retail sales of equipment to detect smoke, heat and flames amounted to \$882 million in 1989, according to the Security Products & Services Report from Leading Edge Reports, Cleveland Heights, Ohio.

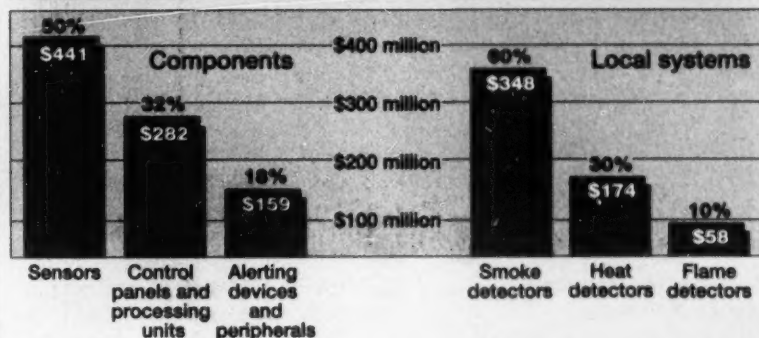
Fire detection equipment in the United States during 1989 represented the third largest segment of the electronic security equipment market, behind intrusion detection and electronic article surveillance, the survey says.

Sensors led fire detection equipment sales in 1989 at \$441 million. Smoke detectors came in second, with sales reaching \$348 million or 60 percent of the local fire detector market.

Of the \$882 million, only 25 percent was spent on equipment to protect residences. This is a shift from the early 1980s when the residential market represented up to 40 percent of fire detection equipment sales.

1989 FIRE DETECTION EQUIPMENT SALES

Percentages indicate percent of total

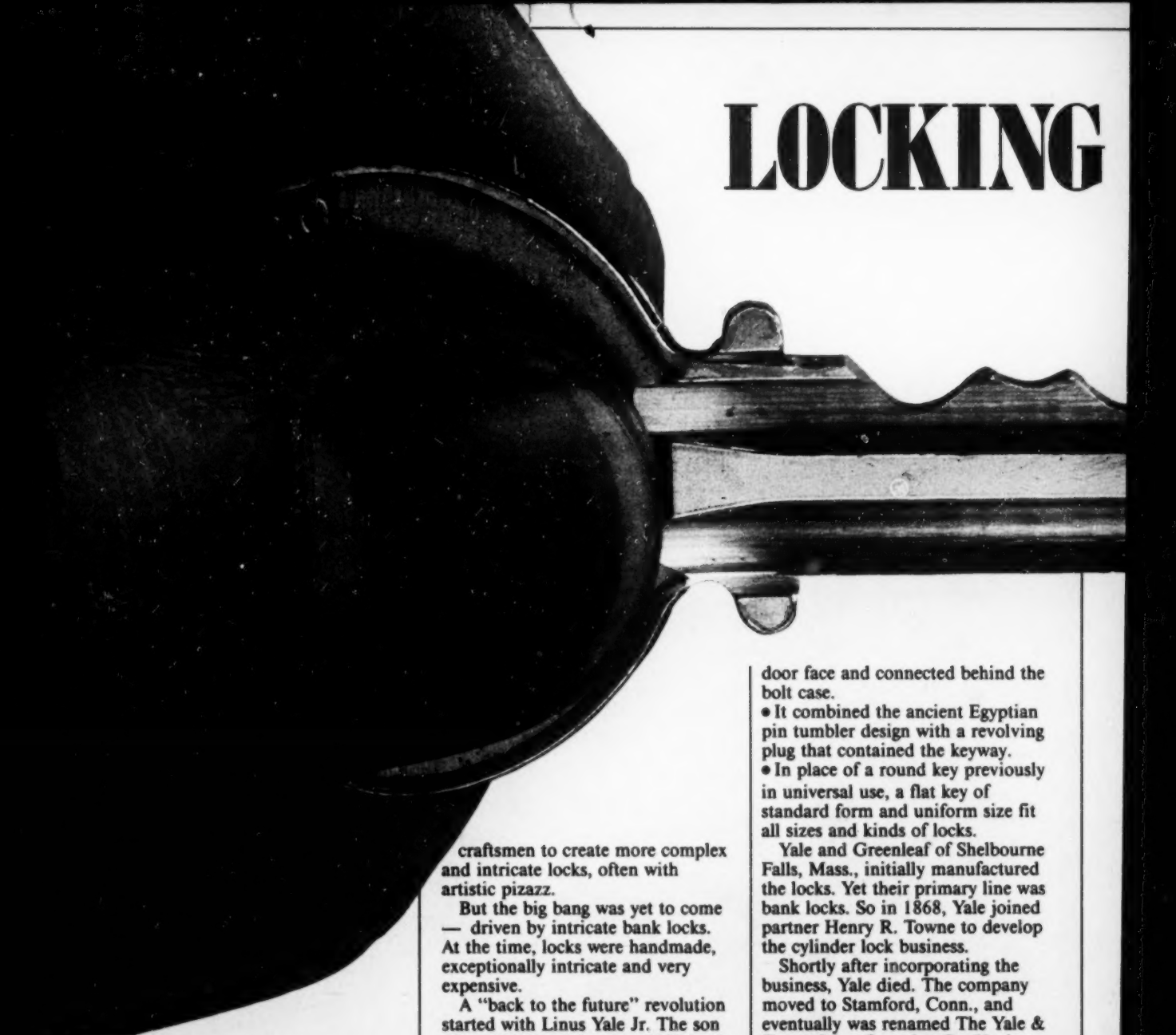


Source: Leading Edge Reports

Sensors led fire detection equipment sales in 1989. Demand for detection equipment is expected to grow 6 percent annually through 1992 to more than \$1 billion.

The Leading Edge report predicts that commercial, institutional and industrial demand for fire detection will continue to rely heavily on retrofit applications, as new construction activity

in these areas is expected to remain modest through 1992. The report points out that the life of most fire detection equipment is 10 to 15 years, and installations were high during the 1970s.



LOCKING

On Pins and Cylinders

Security's history started with the lock. The earliest mechanical lock dates back 4,000 years. A wooden Egyptian pin tumbler lock used a system of pins within a hollow bolt.

The ancient Greeks made what today seems a common sense breakthrough — they put the lock inside the door rather than outside. Romans first made locks from iron and brass rather than wood and produced pick-resistant warded locks, using small internal projections to obstruct the keyway.

Technology developed slowly. Improved production permitted

craftsmen to create more complex and intricate locks, often with artistic pizzazz.

But the big bang was yet to come — driven by intricate bank locks. At the time, locks were handmade, exceptionally intricate and very expensive.

A “back to the future” revolution started with Linus Yale Jr. The son of a well-known Newport, N.Y. bank lock manufacturer, Yale created a series of new locks: “Infallible,” “Magic,” and “Double Treasury,” which established him as the leading lock expert of the day.

In 1862, Yale's Monotor Bank and Double Dial Bank locks marked a transition from key locks to dial or combination locks.

At the time, Yale also experimented with the Egyptian pin mechanism. Patents in 1861 and 1865 set the stage for Yale's most important invention, the “Cylinder Lock.” Standards were set:

- The key mechanism was in a separate cylinder inserted in the

door face and connected behind the bolt case.

- It combined the ancient Egyptian pin tumbler design with a revolving plug that contained the keyway.
- In place of a round key previously in universal use, a flat key of standard form and uniform size fit all sizes and kinds of locks.

Yale and Greenleaf of Shelbourne Falls, Mass., initially manufactured the locks. Yet their primary line was bank locks. So in 1868, Yale joined partner Henry R. Towne to develop the cylinder lock business.

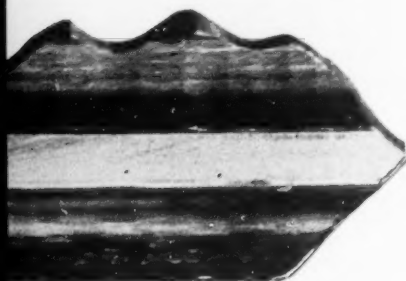
Shortly after incorporating the business, Yale died. The company moved to Stamford, Conn., and eventually was renamed The Yale & Towne Manufacturing Co. Yet just prior to his death, Linus Yale pushed another innovation that helped spread what is today's dominant security device.

This complementing impetus was the U.S. Post Office, when it adopted Yale's post office lock boxes, with a flat-key operated lock.

Also in the inventive 19th century, U.S. lock makers mass-produced locks from cast iron rather than from England's wrought iron. Cost fell and competition heated up. Today, scores of manufacturers produce residential, commercial and high security locks as well as specialty items.

UP YOUR ASSETS

High security, specialties revitalize keys and locks.



By Bill Zalud
Editor

Used for security longer than any other device, key and lock systems have gained new uses, particularly in high security and specialty areas.

Last year, security purchased more locks than access control, CCTV, intrusion and fire systems. Not the biggest dollar purchase (CCTV takes that honor), locks still are a first and only defense for many organizations.

There's also something downright comforting about these 4,000-year-old mechanical systems. (See "On Pins and Cylinders," opposite page.)

"Nothing beats a sturdy lockset and high security cylinder for pure physical protection," contends Mike Crowder, sales and customer service supervisor, Assa Inc., Romeoville, Ill. And business agrees: Crowder estimates 25 to 30 percent growth in high security units.

Better Barrier Protection

"There are two uses for these locks: Securing an area off-hours and entry control," says R.E. Timm, president, R.E. Timm & Associates, Hinsdale, Ill. In each case, users want a quality product, higher security and low maintenance, says Bill Edwards, CML, key records manager at Yale Security, Charlotte, N.C.

"Emphasis has changed a bit from physical security to key control," says Crowder. Bad guys still strong-arm,

kick, hack and beat at locks, but most are beyond that, adds Joe Trombetta, marketing and sales manager, Esmet, Canton, Ohio.

High Security Components

One high security lock essential is composition. Mostly brass, there's also hardened steel and alloys, notable at points of attack. "Above all, they must resist forced entry," says Mark Imhof, product manager at Abloy, Dallas.

Some boast interchangeable cylinder cores for quick core change on-site. "The faster you change a compromised core, the better," points out Indianapolis-based Best Lock's Russell Best, senior vice president. His grandfather, Frank, invented what's become an industry hit. "Before, you had to change the entire lockset. Now you simply replace the core, usually from stock on hand," Best comments.

Tumbler Gymnastics

Tumbler design adds "resistance to picking and jimmying," adds Imhof. There are spring-loaded pin tumblers; 15 and 21 pins compared to the usual six; lift and twist; and even rotating tumblers.

Another high security innovation is the unique keyway. "Legally protected by the maker, a keyway can cover an industry, region or nation," says Crowder. "Very large users may have their own keyway."

Master keying and key control also are vital security features. Master keying targets groups of keys for levels of locks. Master key systems can cover thousands of keys or two. "One key can lock and unlock. By cutting a second key differently, another key can lockup but not open the lock," says Imhof.

Key control limits key duplication and distribution of blanks. "The higher the security," says Phil Willmott, vice president and general manager, door security division, Medeco, Salem, Va., "the harder it is to access keys and blanks."

The manufacturer, local locksmith or, in some cases, customer cuts keys with special equipment and materials. "It's not like your old system. You should understand the differences before starting it," warns Willmott.

Also look at the type and strength of your door, strikes, closers, jamb. Adds

Timm, "What good is the best lock with a false ceiling or unguarded windows?"

Special Handling for Exits

Some doors need extra handling.

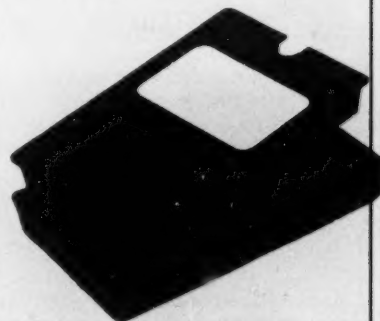
"About two to three percent of all doors are covered by life safety and emergency exit requirements," comments Bob MacDonald, president, Detex Corp., New Braunfels, Texas. Codes mandating unimpeded exit in emergencies vary, depending upon jurisdiction and occupancy.

"It's controversial," suggests Vince Frallicciardi, marketing vice president, Securitron Magnalock, Torrance, Calif. "There's a contention between security and life safety. Mechanicals just don't

Unusual Keyless Lockbox

Keysure is more than a nifty, low-cost key control product. It's Len Sideri's passion. "It's all by itself — it's that unique," boasts Sideri of his pride and joy plastic keyless lockbox.

It can hold a key, password, disaster control information, anything that fits inside. Getting in breaks the box permanently and visibly. "You know if you have a compromise at a glance. Key control's all over the lot. You need accountability beyond what a locksmith or manufacturer provides." The lockboxes also come as part of a key control cabinet. Keysure is in New York City. For details, circle 165.



A keyless lockbox from Keysure visibly shows a compromise of a key inside it.

Emphasis Has Migrated From Physical Security to Key Control

provide security. Employees are as concerned about people getting in as they are about getting out in an emergency."

Mechanical exit controls include push bars and panic bars: Lock and strike and a push lever or a horizontal rod across the door.

For increased security, free egress and delayed exit electric and electromagnetic units marry into monitoring

systems. Unique and newer is delayed egress. "An exit attempt starts a delay reaction and exit alarm. After a set time, usually 15 seconds, the door opens," says Rich Paladino, vice president of sales, Alarm Lock Systems Inc., Amityville, N.Y.

"Unfortunately, there are no real electronic standards for unlocking an exit door — only mechanical ones. Fire

marshals and business need educating," says Frallicciardi. Standards are slowly changing, says MacDonald. "The Builders Hardware Manufacturers Association is near standards to cover electromagnetic and delayed egress locking. The next step is ANSI."

Specialty locks also are hot. They cover "applications that, because of size, constraints, remoteness of location

WHO BUYS WHAT

Security involvement in keys and locks

	Responsibility	1990 Purchases
High security locks	77%	52%
Key controls	73%	52%
Padlocks	70%	65%
Exit controls	69%	52%
Deadbolts	65%	48%
Electronic locks	64%	49%
Push-button, keyless locks	64%	49%

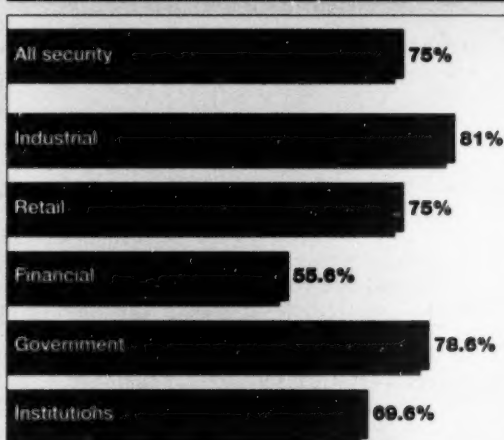
■ Hot growth

There's consistent purchasing of mechanical and electromechanical locks. Totals equal more than 100% because of multiple answers.

Source: SECURITY

COVER THE EXITS

Who purchases door control, panic hardware

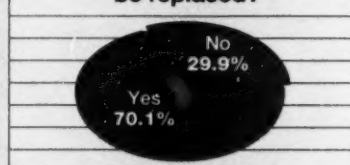


Door control and panic hardware protects exit doors while also meeting local and fire regulations. Total is more than 100% because of multiple answers.

Source: SECURITY

UPGRADING LOCKS

Will mechanical locks be replaced?

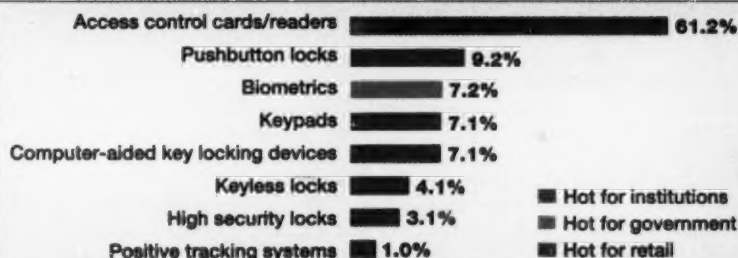


A vast majority of security decision makers believe traditional keys and locks will be replaced with computerized products of some kind.

Source: SECURITY

LOCK REPLACEMENTS

What will dominate as replacements



Access control cards and readers will dominate the next step beyond traditional keys and locks, according to security decision makers.

Source: SECURITY

High Security Locks

or fail-safe need, demand special handling," says Durahm McCauley, executive vice president, McGard Inc., Buffalo, N.Y. Many are engineered into gear being protected.

Specialty Keys and Locks

Some traditional lock companies serve specialized needs. "We have lock-down devices and locks for cabinets,

desks, credenzas and telephones, among others," says Best.

There are niche products, "like high security surface mount locks," says Trombetta. "McDonald's uses our quick-release unit on outdoor coolers."

Another approach is McGard. It created a high security fastener to protect car tires. McGard's high security fasteners now protect gear in the oil industry, utilities and even corrections. The McGard system factors in torque, or the twisting and turning as the key is applied. Computer-generated patterns of torque help make keys and duplicates.

Manhole cover and telephone locks are popular McGard items. "A fire hydrant lock installs without power tools. The operating wrench goes on top of the fire wrench," reports McCauley.

Serving military, defense contractor and business, Sargent & Greenleaf, Nicholasville, Ky., sees additional promise in combination and time locks. Says Gary Kepler, director of sales and marketing services, "Our new Scrambler three-wheel combination lock automatically repositions the wheels upon opening."

Hybrids Add Second Step

Bridging mechanical and electronic are hybrid locks that combine both.

Lori Lock of Southington, Conn., makes cylinders and locks but also a smart key system. The smart key can open a mechanical lock. "And the electronic lock can fit into a standard door," reports Lori's George Nortonen.

And OSI Security Devices of Sunnyvale, Calif., has a combination electronic push-button and mechanical system — the Omnilock.

More electronic access control than key and lock,

some products such as the Intellis System from Schlage Lock, San Francisco, replace the door lock, use some type of card and maintain an audit trail. Re-keying is a matter of programming. □

Who's Deciding?

An increasingly crowded field of people source or specify locks.

"Security decision makers, fire alarm companies, architects, subcontractors, alarm dealers, locksmiths, system houses — each sees it differently," says Vince Frallicciardi, marketing vice president, Securitron Magnalock, Torrance, Calif.

Locksmiths traditionally are the mechanical security industry, according to Mathisen William, executive director of the Associated Locksmiths of America (ALOA), Dallas.

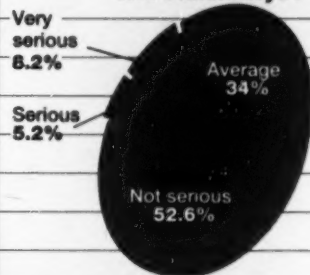
ALOA represents entrepreneurial locksmiths and has an industry-recognized certification program.

Manufacturers also train locksmiths in improvements and new products. "We support the locksmith," says Gary Kepler, director of sales and marketing services, Sargent & Greenleaf, Nicholasville, Ky. The company — like others — offers factory certification on products.

In-house locksmiths also are important. A surprisingly high 62 percent of security decision makers, according to the SECURITY DATA BANK, say they employ an in-house locksmith. Some are part-time or do limited lock maintenance work.

LOST KEYS

How serious is lost and stolen keys?

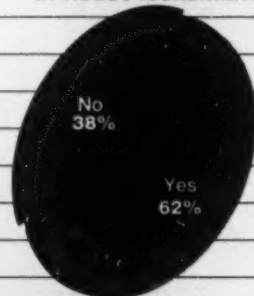


More than eight of 10 security decision makers find lost or stolen keys to be an average or non-serious threat.

Source: SECURITY

IN-HOUSE LOCKSMITH

Do you employ an in-house locksmith?



About six of 10 organizations have an in-house full-time or part-time locksmith.

Source: SECURITY

ENDPIECES

Alerts and trends for your planning effort.

NEXT ISSUE

Read how one security department's efforts pay the bills. **SECURITY's August cover article** looks at security operations at Levi Strauss, where security tracks down enough counterfeit apparel each year to compensate for security expenditures several times over. Tom Nagle, director



Tom Nagle

READER FEEDBACK

SECURITY welcomes your letters, phone calls and comments. This comes from John Forbes, vice president of marketing, Holophane Co. Inc., Neward, Ohio.

"I have read with concern recent promotions for warranties on lighting fixtures that could be misleading to your readers. At first glance, it seems that the manufacturer is [covering] the entire fixture for five years when, in reality, the five-year warranty applies only to the ballast — or the fixture's electrical system.

"Most of the time lighting manufacturers offer a one year warranty on their fixtures, which covers both materials and workmanship. If a unit is defective, the manufacturer will correct the defect, at no cost, by repairing the unit or providing replacement parts. This guarantee is good for one year beyond the date of manufacture.

"In Holophane's case, all fixtures are warranted for two years and the HID electrical components for five years.

"We feel that a promotion that implies that the entire fixture is warranted for five years is misleading and costly. If something goes wrong with a unit after the first year that does not involve the electrical system, the customer is on his own. He must bear the expense and the inconvenience of getting that fixture fixed or replaced.

"As always, it pays to read the fine print in a warranty. It can save a lot of time, grief and money."

Send your letters to **SECURITY** Reader Feedback, 1350 E. Touhy Ave., Des Plaines, IL 60018.

of corporate security and administration, takes on duties ranging from counterfeit product investigations to cafeteria services to emergency planning.

Also in August, learn how to get more out of **security surveys**. Security decision makers offer tips on survey benefits and how to conduct better surveys.

Next issue's **EQUIPMENT FOCUS** looks at the variety of portable two-way radios on the market and the accessories and replacement parts that work with them. FCC licensing will also be discussed. **SERVICES** zeros in on facility management services.

EVENTS

August 12 to 16

The American Correctional Association's 120th Congress of Correction in San Diego. The theme, Proactive Correctional Approach: Building Partnerships for Success, revolves around corrections taking a proactive rather than reactive approach to problem-solving. For information call ACA at (301) 206-5100.

August 13 to 15

The American Society for Industrial Security offers "Statement Analysis: The Art of Obtaining Confessions," to be conducted in Alexandria, Va. The program will analyze truth and deception and pre-employment screening. Call (703) 522-5800 for information.

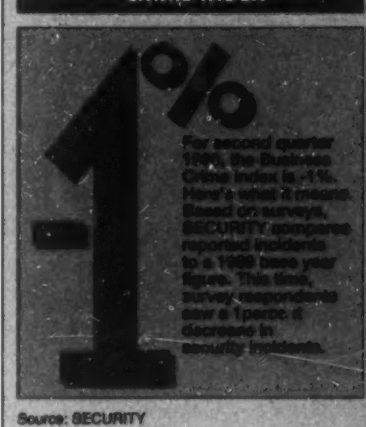
IN SECURITY



You could say Larry was born to be an officer at a monitoring station.

BUSINESS CRIME INDEX

SECURITY'S BUSINESS CRIME INDEX



SECURITY's exclusive Business Crime Index appears quarterly in ENDPIECES.

QUICKIE QUESTION

Before you send in the Reader Service Card for product information, consider this Quickie Question:

Has a key control problem at your organization contributed to an increase in security incidents in the past six months?

If you say YES, circle 170 on the reader service card.

If you say NO, circle 171 on the reader service card.

If key control doesn't apply to operations at your organization, circle 172.

YOUR ANSWERS

In April, **SECURITY** asked readers if computer viruses have been caught within their organizations in the past year, or if they personally know someone who has experienced a computer virus.

Among respondents, 28 percent say they or a colleague has experienced a computer virus in the past year. Seventy-two percent say neither they nor a colleague has dealt with a computer virus in the last year.

A CAHNERS PUBLICATION

AUGUST 1990

SECURITY™

THE MAGAZINE FOR SECURITY DECISION MAKERS

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Improving
Security Audits p. 36

Facilities
Management
Services p. 57

Innovative Guard
Tour Systems p. 48

Equipment Focus: Portable Radios p. 62



Tom Nagle
Director of Corporate Security
and Administration,
Levi Strauss & Co.

SECURITY^{T.M.}

THE MAGAZINE FOR SECURITY DECISION MAKERS

A CAHNERS PUBLICATION/VOLUME 27, NUMBER 8/AUGUST 1990

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Security surveys offer evaluations and create a framework for action. (p. 36)

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Tom Nagle, director of corporate security and administration, contributes to the overall success of Levi Strauss & Co. by taking on broad responsibilities. (p. 42)

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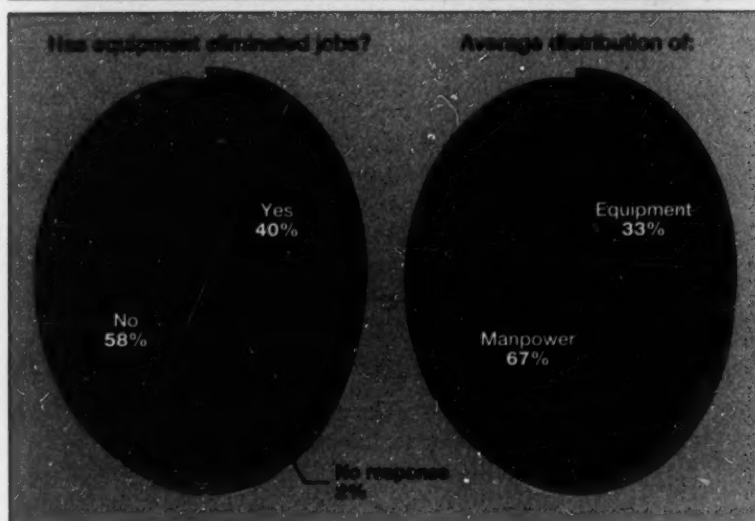
SECURITY (ISSN 0890-8826) is published monthly, except for March and August when two issues are published in national and separate editions, by The Cahners Publishing Company, A Division of Reed Publishing USA, 275 Washington St., Newton, MA 02158-1630. Terrence M. McDermott, President; Charles E. Moodhe, Senior Vice President/General Manager, Chicago Division; Jerry D. Neth, Senior Vice President/Publishing Operations; J.J. Walsh, Senior Vice President/Finance; Thomas J. Dellamaria, Senior Vice President/Production and Manufacturing; Ralph Knupp, Vice President/Human Resources. Circulation records are maintained at Cahners Publishing Company, 44 Cook St., Denver, CO 80206-5800. Phone: 303/388-4511. Second-class postage paid at Denver, CO 80206-5800 and additional mailing offices. Postmaster: send address corrections to SECURITY at 44 Cook St., Denver, CO 80206-5800. SECURITY copyright 1990 by Reed Publishing USA; Ronald G. Segel, Chairman and Chief Executive Officer; Robert L. Krakoff, President and Chief Operating Officer; William M. Platt, Senior Vice President. Annual subscription rates for non-qualified people: USA, \$59.95; Canada/Mexico, \$89.95; other countries, \$115 for surface mail and \$165 for air mail. Special issues, including product directory, are \$50. Except for special issues where price changes are indicated, single copies of regular issues are available for \$10, \$14 and \$18 (USA, Canada/Mexico and foreign). Please address all subscription mail to SECURITY, 44 Cook St., Denver, CO 80206-5800.

SECURITY INDICATORS

Trends and forecasts for determining loss prevention needs.

EQUIPMENT CHALLENGES MANPOWER

Those who rely on equipment at the expense of manpower



Source: SECURITY

For the most part, security retains personnel despite mounting equipment purchases. Industrial security most likely increases reliance on equipment.

SECURITY SURVEY

Manpower Distribution Holds Its Own In Wake of Increased Equipment Reliance

It's in the headlines all the time: People lose their jobs when faster and more powerful technology enters the workplace. Within security departments, security technology has eliminated some jobs, says SECURITY's Second Quarterly Telephone Survey, but manpower continues to satisfy two-thirds of security's needs.

Less than half of survey respondents — 40 percent — say their department increased reliance on equipment at the expense of human resources in the last year. Industrial respondents are most likely to increase equipment reliance, at 62 percent. Institutions continue to depend on human

resources to satisfy security needs; just 13 percent increased equipment reliance at the expense of personnel in the last year.

Manpower allocation dominates equipment use, the survey says. On the average, manpower distribution accounts for 67 percent of security resources. Retail reports the highest manpower dependence: 33 percent of retail respondents look to manpower to satisfy 90 to 99 percent of security's tasks. The government also reports steady manpower dependence: 50 percent of government respondents say manpower performs 70 to 79 percent of tasks.

Organizations that employ fewer than 500 people depend on human resources most often to get the job done, according to the survey.

SUBSTANCE ABUSE

Testing Status Affects Substance Abuse Perceptions

Firms engaged in drug testing are twice as likely as their nontesting counterparts to characterize their substance abuse problems as alcohol-and drug-related as opposed to exclusively alcohol-related. This according to a survey of 681 major corporations conducted by the Conference Board.

Companies that do not conduct drug tests are most concerned with problems related to alcohol abuse and addiction, the study says, while testing companies perceive both alcohol and drugs as workplace problems.

The decision to test employees for drugs usually requires input from several departments within an organization, the survey shows. On the average, executives from at least four areas determine drug abuse policy. The human resources department is involved 94 percent of the time; security is called on to help with the decision-making process 26 percent of the time.

The decision to test employees for drugs is most often reached following six to 11 months of consideration, the survey says.

Among the perceived benefits of drug testing, improved applicant quality and safer work environment top the list.

EXECUTIVES' PERCEPTION: WORKPLACE DRUG USE



Source: The Conference Board

Nontesting firms perceive alcohol as the most abused substance.



EMPLOYEE THEFT

Weak Awareness Secures Sky-High Theft Figures

Opportunity — not job title or length of service — encourages employees to steal, says a Loss Prevention Consultants study titled "The Silent Partner — How Many Do You Have?" The study, which is based on thieves' confessions, documents theft activities among 345 employees responsible for \$1,031,970 in shrinkage over a four-year period.

Employee theft is not a "seasonal virus" according to the study. On the average, the employees took cash or merchandise during more than 50 percent of days worked.

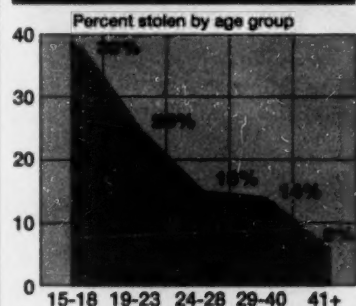
Accessibility — more than financial need — fuels thieves' desire to steal, the study finds. Among 15- to 18-year-olds, 50 percent say they stole because it was easy. Reason for stealing evolves with age, however; 52 percent of those 41 and over steal to satisfy financial needs. Younger thieves are more likely to steal electronics and gadgets, while older employees more often steal cash.

William Urban, president, Loss Prevention Consultants, Minneapolis, says heightened security awareness is the key to cutting down employee theft.

"Catching thieves early is crucial, because once they start stealing they don't stop until they're caught," Urban tells

SECURITY. "Begin by informing employees about theft consequences during orientation. Don't just throw in a five minute discussion about theft at the end of orientation. Taking 20 minutes to explain the program and that it must be taken seriously saves time and money later."

THIEVES' TAKE-HOME PAY



Age	Cash	Merchandise
15 to 18	\$392	\$535
19 to 23	\$1,812	\$498
24 to 28	\$1,647	\$1,532
29 to 40	\$7,997	\$610
41 and over	\$4,564	\$941

Source: Loss Prevention Consultants Inc.

While younger employees steal most often, older groups steal more cash.

NEWS

Security Wrap-Up: Drug Testing, Homelessness

► The National Security Institute calculates that **employee drug testing** is a billion dollar a year industry. Employee dishonesty, however, costs American business \$50 billion a year, the Institute says.

► When dealing with the current **homeless population** of 500,000, these demographics from the Manhattan Institute can better prepare security for confrontations. Between 80 and 90 percent of the homeless are men, but families make up 23 percent of the total homeless population. Among singles, 20 percent have been homeless for four years. Between 28 and 48 percent of the homeless are mentally ill, and at least one-third are substance abusers. Homeless individuals are likely to sleep in public places, while families seek city-provided shelters. At least 50 percent of the currently homeless have been homeless before.

► The Justice Department will award **anti-drug abuse grants** totaling more than \$395 million to states and municipalities during 1990. Eligible states will receive at least \$987,753, with more based on population size. Local governments will also receive grants.

PURCHASING

Door Control, Fire Equipment Attract Security Dollars

Fires are a hot concern among those who purchase security equipment, according to SECURITY's Second Quarterly Telephone Survey of security decision makers.

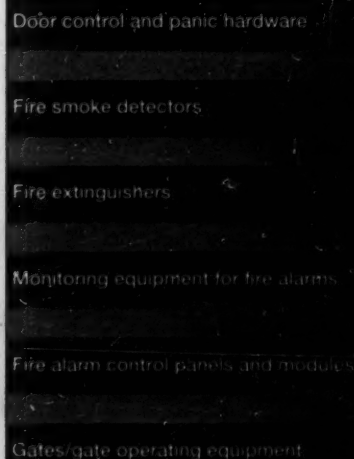
While door control and panic hardware were most frequently purchased by respondents in the last year, fire-related equipment falls into the next four slots for popularity.

Big sellers specific to type of business were fire smoke detectors, which 81 percent of industrial respondents and 75 percent of retail purchased; fire extinguishers, which 83 percent of retail purchased; gates and gate operating equipment, which 72 percent of industrial and government respondents purchased; and door control and panic hardware, which attracted 81 percent of industrial and 75 percent of retail respondents.

Turnstiles, guardrails and grilles scored low among all groups of prospective buyers.

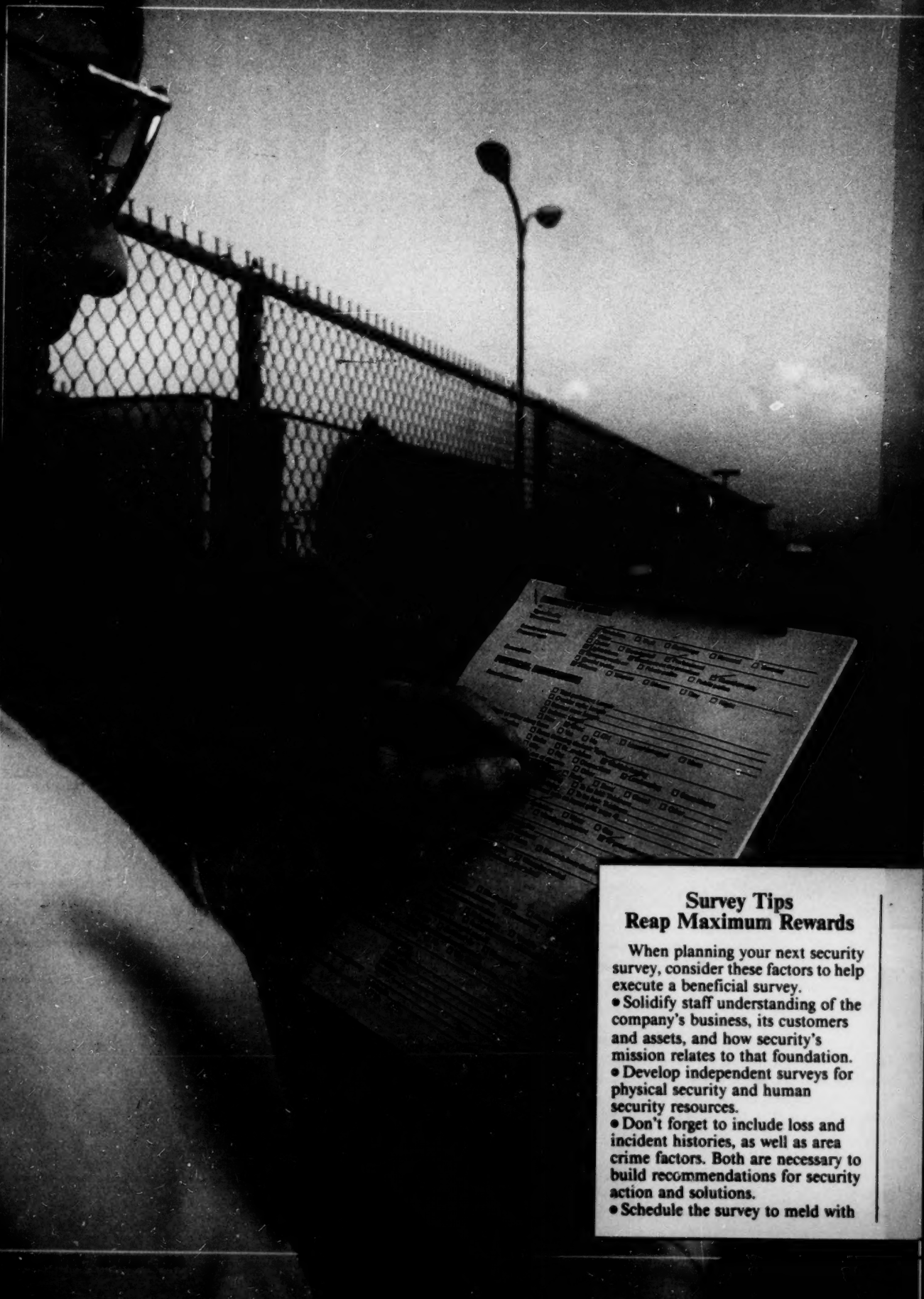
HOT SELLERS: FIRE EQUIPMENT DOMINATES SECURITY PURCHASES

Percent buying this equipment in the last year



Source: SECURITY

Fire equipment dominates the list of best-selling security equipment. Retail buyers were especially active in acquiring new fire-related equipment.



Survey Tips Reap Maximum Rewards

When planning your next security survey, consider these factors to help execute a beneficial survey.

- Solidify staff understanding of the company's business, its customers and assets, and how security's mission relates to that foundation.
- Develop independent surveys for physical security and human security resources.
- Don't forget to include loss and incident histories, as well as area crime factors. Both are necessary to build recommendations for security action and solutions.
- Schedule the survey to meld with

SECURITY SURVEY YIELDS RESULTS

The tried and true security survey does more than identify assets, vulnerabilities and solutions — it's a bona fide management tool.

By Rebecca D. Russell
Senior Editor

The mirror doesn't lie; neither do security surveys.

A thorough security survey provides the good and not so good truths about security's accomplishments. It's a seasoned tool that pinpoints areas for improvement, whether checking perimeter controls or determining manpower effectiveness.

Getting the most from a security survey takes initiative, planning and requires perseverance.

Whether checking perimeter controls or manpower effectiveness, the security survey offers evaluation, creating a framework for action.

fiscal planning. Findings may prompt requests for additional funds and/or cost and manpower sharing with another department.

- Talk with managers and employees to learn their needs. After the survey, keep staff and employees up to speed on meeting challenges and maintaining security.
- Work with a consultant to gain a fresh perspective at familiar sites.
- Make sure employees keep security abreast of changes in the workplace.
- Wrangle senior management understanding of this project. Share recommendations and security action to show how the department meets vulnerabilities.

The ever-changing face of business provides incentive to keeping surveys up-to-date. Restructurings, acquisitions and mergers often force the issue: A new boss or potential purchaser may request a survey to better understand what threats and protections exist.

Change Provides Opportunity

"Many corporations don't realize security is intangible. They accept losses up front, then pass the cost on to consumers. It does affect the bottom line," says Richard Haynes, a Charleston, W. Va.-based consultant.

Harold Rudd, security supervisor, Cincinnati Milacron, says a recent buyout and management shift at the Maineville, Ohio, company gave security the opportunity to conduct its first formal survey in five years.

"I walked around the building last week and saw problems. One fence is overgrown — it's something that has been let go. I'd like to get it cleared, but we've had financial and personnel problems recently, just like a lot of other businesses," he says.

Work site changes signal that it's time for security to take a fresh look, says Ray Chambers, CPP, president, Assets Protection Systems Associates Inc., Largo, Fla. Changes can include a building addition, equipment retrofit, staff growth or cutback, lighting revamp or office space reconfiguration. Changes to company or neighbor perimeter also need addressing.

In fact, Chambers says, a survey may point out changes that security didn't know about — also providing a good time to reiterate security's capabilities and need to know.

Another bonus: security may discover that it would make fiscal sense to share tasks/responsibility with other departments. A recent SECURITY survey found that 54 percent of respondents share some costs with another department. Of those that share, 54 percent do so to reduce operating costs, 23 percent to consolidate departments.

Frequency Reflects Philosophy

How frequently your security department surveys operations depends on the industry and business philosophy toward security itself.

SECURITY's recent national telephone survey discovered that 71 percent of security decision makers say their department conducts security audits/surveys.

That study also shows survey frequency (see chart, "Frequency Reflects Philosophy"). The largest percent of respondents, 24 percent, conduct a survey twice a year, while 23 percent survey annually. On the opposite end of the spectrum, 9 percent survey weekly while 6 percent say the survey is an ongoing, continuous task.

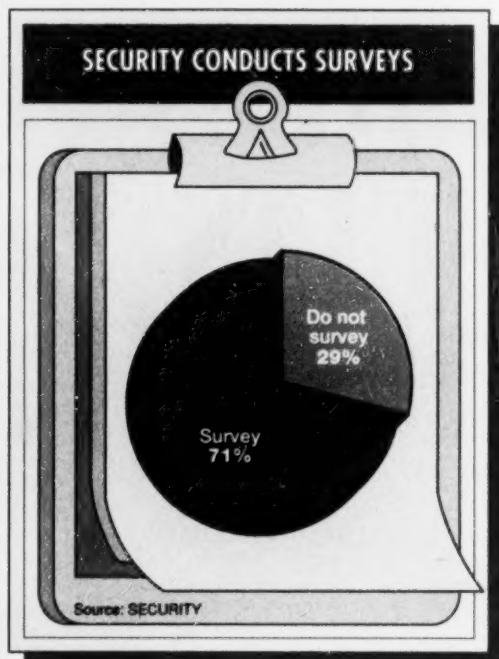
Sharon Lutz, director of security, Breckenridge Frontenac Hotel, says surveys are an ongoing responsibility for the St. Louis hotel's 10-member security staff.

"The staff doesn't mind doing it because we take a lot of pride in our work. We realize that potential loss could kill us," she says.

Once each week, an officer conducts a formal fire and safety equipment inspection, including a written report.

Frank Gonzalez tailor-made a security survey for new construction pro-

Up-to-Date Surveys Translate to Bottom Line Terms



The majority of security decision makers survey physical protection and/or manpower.

jects. As Liz Claiborne's director of corporate security in North Bergen, N.J., Gonzalez heads security for multiple sites and new construction: 10 distribution centers, two office buildings, two soon-to-be-constructed office buildings, plus 80 existing retail stores and 12 new stores under construction this year.

Gonzalez uses a three-stage survey for each new site. Before each survey he addresses these points.

- Consider the business, its goals and objectives.
- Pre-planning is essential. "You can't expect to go in there and wing it," he says.
- Talk with building occupants and learn their needs. With so many new construction projects, this is a necessity for Gonzalez. One new facility will house a check-generating payroll area; future occupants expressed the

need for extra precautions in this area and security's construction plans reflected that need.

Squeezing Time for a Survey

This communication link is crucial to survey success. When refining or planning a survey, talk with organization decision makers to ensure a match between the areas that can be surveyed, what all parties can expect as a realistic response and how the sur-

vey can impact the company.

Like a growing number of security decision makers, Charles Baron-Klask hires a consultant to conduct an annual survey. It saves staff time and provides crucial certification that affects business profit.

Baron-Klask is chief of security at Technicolor Videocassette of Michigan Inc., Livonia. Membership in the Motion Picture Association of America Inc. includes access to that body's security consultant.

"When we go around our site on our own, we are more apt to overlook things," he says. "The consultant will tell you things you don't necessarily want to hear."

Sign Up for Survey

Once a year he schedules a general time for the survey; he learns of the actual date 24 hours beforehand. The surveyor discusses findings and recommendations using a 20-page form. He says security follows through on recommendations as budget permits.

Conducting this annual survey translates directly to business terms because Technicolor is one of the leading videotape reproduction houses in the country, serving major film studios. "That our security passes the test directly relates to the amount of business we get; these studios will only work with people approved by MPAA," Baron-Klask says.

Like Baron-Klask, Lutz sees direct results from security's surveys — in the form of insurance cost breaks. When weekly surveys indicated vulnerabili-

Resources Soothe Survey Woes

Publications and services provide guidance in producing a survey. Here are some true blues and new kids on the block. Circle the corresponding number on the reader service card for complete information.

• *Protection of Assets Manual and Bulletin* includes a four-volume manual plus monthly updates with practical management information. Circle 160

• *Introduction to Security and Loss Control*, by Norman R. Bottom Jr., CPP, and John

Kostanoski, published by Prentice Hall. Includes a chapter on loss control surveys. Circle 161

• *Personal and Organizational Security Handbook*, second edition, by S. Blumenkrantz, published by Government Data Publications. Includes a workbook. Circle 162

• *Security: Adequate or Not?* by Chris E. McGoe, CPP, published by Aegis Books. Examines premises liability litigation and security

evaluation. Circle 163

• The CAP Index was developed by Robert Figlio, Ph.D., to help businesses assess crime vulnerability. Circle 164

• "Retail Shrinkage Control Questionnaire" helps those in the retail sector identify control loopholes. Mention SECURITY and it's free for the asking at Coopers & Lybrand, Attn.: Publications Dept., 1251 Avenue of the Americas, New York, N.Y. 10020 or phone (212) 536-3257. Circle 165

ties, security added safety programs in response. "That is bringing our premiums down," she says.

"We notify our carrier any time we do something new. They monitor it to see how it is going," she says. Establishing a safety committee and fire management both helped; other programs have reduced the premium on worker compensation insurance, she says.

Fine-Tuning for Maximum Results

It's critical to include crime analysis information says Scott D. Roulston, CPP, president of Topwatch Corp., Cleveland.

When refining and planning a survey, talk with organization decision makers to ensure a match between objectives and results.

Norman Schroeder, director of security, Hoffmann-LaRoche & Co., Nutley, N.J., includes the CAP Index in site evaluation. The index helps business determine a neighborhood's vulnerability and foreseeability of crime — hot topics in litigation.

"The specificity and refined data of the survey appealed to management. We persuaded them to include it when new sites are being built," Schroeder says.

"Sometimes the results are almost incredible. We see a facility in what you would think is a sleepy little town and the results say otherwise," he says. Then, it takes work to "sell" the credibility of the study.

There are innumerable tools to help get the maximum output from security input (see "Resources Soothe Survey Woes"). Just as decision makers customize surveys to meet business needs, others fine-tune their tools to maximize results.

Tom Woodal, director of the Physical Security Division of General Services Administration's Federal Protective Service, Washington, D.C., developed a tool now used by more than 7,000 sites nationwide. The computer-based Risk Assessment Matrix (RAM) provides a list of potential risks as well as recommended countermeasures, costs

and scheduling information.

This information is compiled when combined with the results of a manual physical security survey. RAM then examines 10 attributes which affect security. Results also incorporate crime incidents in or around the building in the last year.

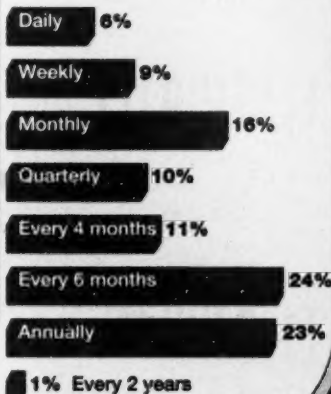
Communicate for Success

Don't forget the human element when looking to maximize return on survey investment. Once the results are in, it's important to keep communicating with staff members and participants outside the department. That will better facilitate full participation, to maintain successful levels of security and accomplish new goals.

At this stage, planning and foresight pay off. If security has taken the time to build management interest in the exercise plus seen to it that realistic goals can be accomplished, the survey will prove to be time well spent.

It requires management support, Haynes says. "You have to feel your industry and what management wants," he says. "A survey helps you identify strengths, weaknesses and vulnerabilities. Yet often after it is done it gets put on a shelf. It all begins and ends with management and their attention to security." □

FREQUENCY REFLECTS PHILOSOPHY



Source: SECURITY

Survey frequency varies according to company philosophy, industry, staff capability and resources.

The Survey As Security Awareness Tool

By expanding the definition of a security survey, you can measure security awareness and perception among employees.

Consultant Richard Haynes recommends regular awareness surveys. Ask: "Do you educate your employees on the importance of security?" he says. "Employees must be able to identify the significance of their participation. If they can see specific threats, they will be more inclined to help with security efforts."

Employee surveys are gaining

popularity. It can be as simple as a questionnaire distributed to employees, asking key questions related to security operations and services. In return you can identify strongpoints and see any perception problems.

Also consider a survey of company hiring and screening practices, suggests consultant Ray Chambers. By looking at the process, from interviews to background checks, security can learn what will improve the process to enhance security efforts.

Policies, Procedures, Devices Lag Info Security Threats

Networking, lack of planning put computers at risk, says national info security study.

By Bill Zalud
Editor

More than four out of every 10 U.S. businesses may be unnecessarily vulnerable to breakdowns that stop the flow of critical information, according to the 1989 national Ernst & Young Computer Security Survey.

The survey gauges opinions of upper-level management, security and data processing management, and analysts and auditors.

Not surprisingly, computer system failures or downtime caused financial

losses at 50 percent of organizations in the past two years. At the same time, about 23 percent reported financial losses because of malicious acts.

Getting a handle on the dollar extent of damage indicates most losses congregate at the lower end. Dollar figures remain the same or decrease slightly when compared to Ernst & Young's 1988 survey. For example, of the 23 percent reporting malicious act losses, 16 percent lost up to \$50,000, due to acts including fraud and embezzlement. It was 18 percent the year previous.

Further, 5 percent experienced

\$50,000 to \$1,000,000 in losses and 2 percent had losses of more than \$1,000,000.

Yet, respondents are — as a group — convinced that information and computer security is important and security risks are increasing.

Risks Increase

While 84 percent believe information and computer security is important, 71 percent report risks increased over the past five years, a 21 percent increase over the year before.

Most respondents also believe risks

INFO SECURITY GOALS: MANAGEMENT VS. SECURITY

Security	Where Invested	Management
42 percent	System Availability Continuity	59 percent
19 percent	Data Confidentiality	7 percent
27 percent	Data Integrity	20 percent
12 percent	Business Continuity	13 percent

Source: Ernst & Young

Management stresses use of computers while security stresses protection needs.

TYPES OF PROTECTION

Percent Using	Solution
82 percent	Optional access control software — ACF2 and RACF, for example.
73 percent	Uninterruptible power sources (UPS).
63 percent	Redundant communications or power to avoid single points of failure.
28 percent	Virus detection software — relatively inexpensive and limited protection.
20 percent	One-time, token-based passwords.
18 percent	File encryption.
14 percent	Communications encryption.
11 percent	Encryption-based personal computer access control.

Source: Ernst & Young

Shared and embedded schemes and quick fixes are most attractive types of protection.

are increasing on pace or even faster than the growth of computing in their organizations.

Driving the risks up: organized, sophisticated perpetrators; increased dependence on computers to conduct business; and growth of networking. Networking brings computer access to more people and allows sharing of applications and data bases inside and outside organizations.

The source of threats also shifts. Last year respondents felt threats came more from inside than outside. For instance, 44 percent are most concerned with protecting information from employees who do not need to know, while 32 percent cite the need to protect information most from competitors.

The year before, competitors beat out employees as the number one threat. The difference: manufacturing companies see competitive threats more keenly than service organizations. And, as the economic balance tips to services, a traditional perspective will diminish.

Differences in Viewpoint

Security and upper management split when it comes to where to invest security resources.

While both see computer service availability and continuation as the essential first area to protect, security seems more committed to the issues of confidentiality and integrity.

Yet, if continuity is of prime importance, there's too little planning for it. Only 16 percent of firms report formal, written business continuity plans, including testing with appropriate drills, walk-throughs and third-party reviews.

Access Weaknesses

Access control is another tool inconsistently applied. A vast majority of firms (87 percent) limit data center access to people who work in it. But 13 percent permit access by other data processing personnel, whether they work in the center or not.

Controlling data access also is spotty. On the one hand, 54 percent restrict data access to authorized personnel and limit users to only data required for their jobs. On the other hand, 30 percent limit data access control to computer-resident data only.

More risky yet, 16 percent either have no access control program or permit users access to all data except as otherwise restricted.

Protection Devices Vary

There's a diversity of security technologies and products to protect equipment, software and data.

Not using available technology is a minor irritation compared to the damage that a lack of policies can cause. Yet, nearly two out of 10 organizations have no policy or policy requirements specific to their information assets. □

More Planning; Cover Real Threats

Among major conclusions of the Ernst & Young Survey:

- Not enough planning.
- Only 16 percent of companies acknowledge thorough, organization-wide business continuity planning, despite strong emphasis on integrity and availability as key objectives.
- With encryption already available, only 5 percent use it for all confidential data in public networks.

• As computers network and share data bases and applications, only 17 percent say unintended use of networks is an important issue.

When defining network threats, 38 percent of organizations answering the survey say tampering or interference with the intended operation of the network or the unintended use of the network are prime security concerns. Threats to computer applications from users of the network was mentioned by 26 percent of respondents.

The loosey-goosey nature of emerging networks makes things tougher: 10 percent are unable to safely identify network users.

TYPES OF POLICIES

Percent Having	Policy Type
71 percent	Policies state who controls data access.
53 percent	Require informing all employees of their data security responsibilities.
32 percent	Data security orientation for new employees.
28 percent	All data labeled — sensitivity to disclosure.
26 percent	Data security responsibility separate from continuity of service and business.
17 percent	No policy requirements.

Source: Ernst & Young

Data ownership is popular, while nearly two out of 10 have no policy requirements.

SOURCE OF THREATS: MANUFACTURING VS. SERVICE COMPANIES

Manufacturing	Source of Threat	Service
39 percent	Employees	48 percent
38 percent	Competitors	28 percent

Source: Ernst & Young

Manufacturers traditionally see competitors more as a security threat.

ASIS Anniversary and Meeting, Sept. 10-13, San Francisco

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SEPTEMBER 1990

SECURITY^{T.M.}

THE MAGAZINE FOR SECURITY DECISION MAKERS

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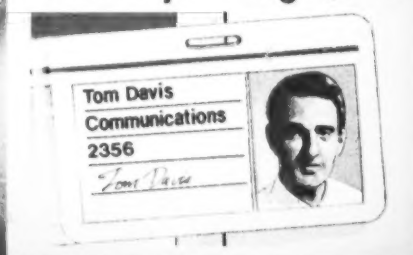
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William C. Cunningham
Project Director
The Hallcrest Report II
President
Hallcrest Systems, Inc.

THE HALLCREST REPORT



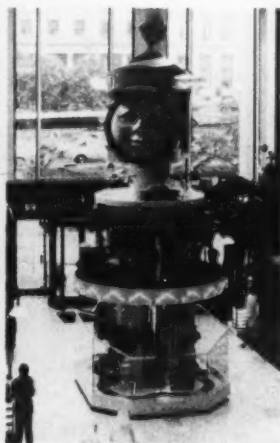
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THE MAGAZINE FOR SECURITY DECISION MAKERS

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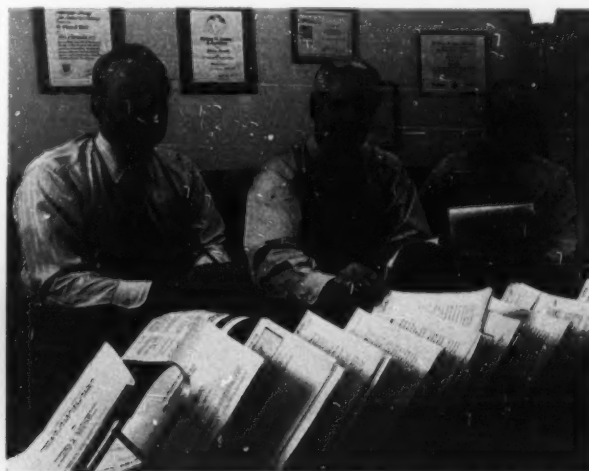


Toy store security isn't all fun and games. (p. 19.)

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WHAT'S HAPPENING TO SECURITY?
SECURITY begins its year-long exclusive in-depth coverage of the influential *Hallcrest Report II*. This month, interviews with the men behind the study of private security.



John J. Strauchs, William Cunningham and Clifford W. Van Meter are the men behind *Hallcrest Report II*. Learn how the report reflects a changing industry. (p. 42)

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Technology's advances simplify and expand potential. Yet what is the cost to security?
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Videos deliver training message like no manual can.

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William Cunningham, president, Hallcrest Systems Inc., served as project director for *Hallcrest Report II*, a milestone study that shows how the security industry is changing. (p. 42)

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SECURITY (ISSN 0890-8826) is published monthly, except for March and August when two issues are published in national and separate editions, by The Cahners Publishing Company, A Division of Reed Publishing USA, 275 Washington St., Newton, MA 02158-1630. Terrence M. McDermott, President; Charles E. Moodhe, Senior Vice President/General Manager, Chicago Division; Jerry D. Neth, Senior Vice President/Publishing Operations; J.J. Walsh, Senior Vice President/Finance; Thomas J. Dellamaria, Senior Vice President/Production and Manufacturing; Ralph Knapp, Vice President/Human Resources. Circulation records are maintained at Cahners Publishing Company, 44 Cook St., Denver, CO 80206-5800. Phone: 303/388-4511. Second-class postage paid at Denver, CO 80206-5800 and additional mailing offices. Postmaster: send address corrections to SECURITY at 44 Cook St., Denver, CO 80206-5800. SECURITY copyright 1990 by Reed Publishing USA; Ronald G. Segel, Chairman and Chief Executive Officer; Robert L. Krakoff, President and Chief Operating Officer; William M. Platt, Senior Vice President. Annual subscription rates for non-qualified people: USA, \$59.95; Canada/Mexico, \$89.95; other countries, \$115 for surface mail and \$165 for air mail. Special issues, including product directory, are \$50. Except for special issues where price changes are indicated, single copies of regular issues are available for \$10, \$14 and \$18 (USA, Canada/Mexico and foreign). Please address all subscription mail to SECURITY, 44 Cook St., Denver, CO 80206-5800.

SECURITY INDICATORS

Trends and forecasts for determining loss prevention needs.

RISK MANAGEMENT

Caps on Damages, Safety-Related Issues Lead Risk Managers' Concerns

Unpredictable costs associated with America's civil justice system and safety-related issues such as increasing worker compensation costs, a drug-free workplace and hazardous waste management are among risk managers' top 15 concerns, according to the 1990 National Risk Management Survey conducted by Alexander & Alexander, Washington, D.C.

Risk managers representing manufacturing; services; utilities; oil, gas and natural resources; and chemical production industries were surveyed. Respondents ranked the importance of 68 legislative and regulatory risk management issues.

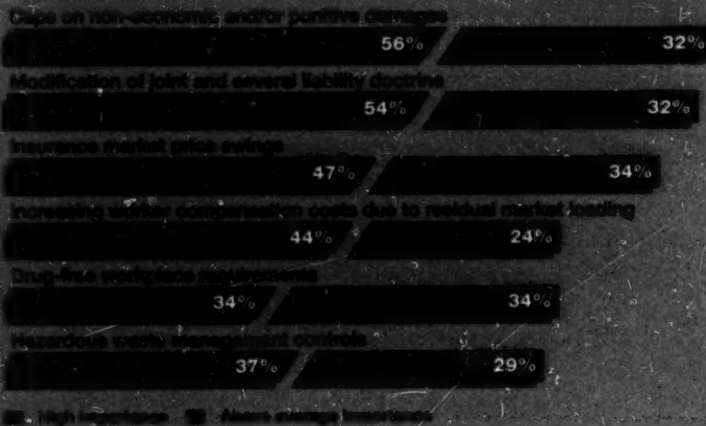
Worker compensation issues account for two of the top 15 risk management concerns, underscoring the need for safe, drug-free work environments. Interest in establishing federal standards or curbs on state worker compen-

sation programs ranks 14th among concerns, demonstrating risk managers' preference for more consistency among programs.

As in 1989, caps on non-economic and/or punitive damages is the most important risk management issue. Following closely is interest in modification of joint and several liability doctrine. Insurance buyers say this doctrine unjustly exposes "deep pockets" to significant costs, regardless of other defendants' contributions to harm. Unpredictability of insurance market price swings ranks third in the overall rating.

Laurie Londoner, A&A's director and vice president of government and industry affairs, tells SECURITY, "While many risk managers benefit from lower insurance pricing, they are still concerned about abrupt price changes in the market. Insurer insolvencies are also a leading concern."

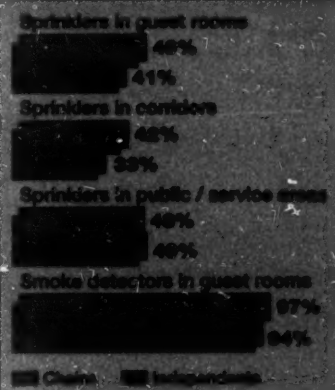
RISK MANAGERS RATE THE RISKS Areas identified among top concerns



Source: Alexander and Alexander

Risk managers identify civil justice costs and workplace drugs among top concerns. On a scale of 1 to 5, 4 denotes above average importance and 5 high importance.

HOTELS: FIRE PROTECTION INTEREST IGNITES



Source: American Hotel & Motel Association

Smoke detectors, sprinklers or both protect nearly all lodging facilities.

SAFETY

Fire-Conscious Lodging Industry Protects Guests

Nearly 100 percent of the United States' hotels and motels protect guest rooms with smoke detectors, according to the American Hotel and Motel Association, Washington, D.C.

The association's report, "Fire Protection in the Lodging Industry," represents 4,500 hotels and motels — both chains and independents — which operate 762,000 guest rooms. Ongoing Congressional debate over the industry's use of built-in automatic fire detection and suppression equipment prompted the association to research the issue.

In addition to finding that smoke detector use within hotel and motel guest rooms is almost universal, the results show that nearly half of public and service areas are equipped with sprinklers.

The findings, according to Thomas Daly, AH&MA chairman of the safety and fire protection committee, reveal that today's guests in lodging establishments are "safer than ever from the threat of fire."

SHRINKAGE

EAS Effectiveness Varies With Industry and Thief

Retailers most frequently use low-tech devices to deter theft — yet electronic article surveillance (EAS) is overwhelmingly cited as the most effective anti-theft device. So says an Ernst & Young study on security and shrinkage conducted with 176 mass merchants.

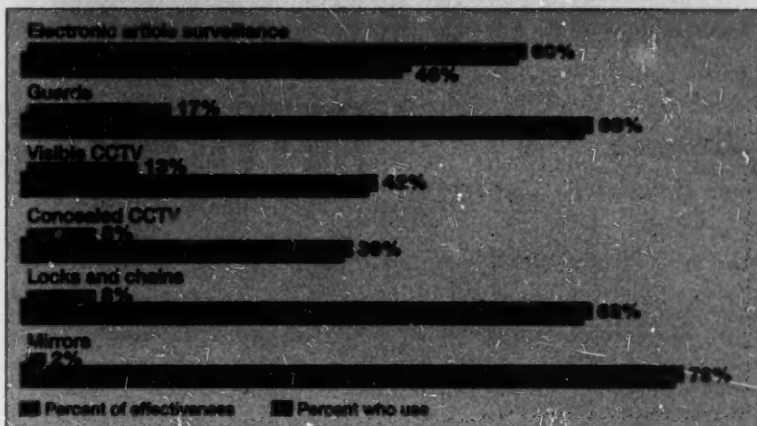
High EAS start-up costs prevent many retailers from investing in the technology. Other reasons why actual EAS use trails effectiveness are dictated by each industry.

Hal Marsolais, managing director of the National Retail Hardware Association and executive director of the Home Center Institute, Indianapolis, says the hardlines industry deliberately continues to depend on less costly measures to combat shrinkage.

"We don't rule out the fact that EAS is a major theft deterrent," Marsolais tells SECURITY. "Its usefulness, however, is dictated store-by-store and market-by-market. In the hardlines industry, a noticeable staff, mirrors and operational measures such as displaying tools behind plexiglass help reduce theft."

HOW RETAIL BATTLES SHRINKAGE

What works vs. what's used



Source: Ernst & Young

Electronic article surveillance reaps the highest overall effectiveness rating against shrinkage. High start-up costs and limited appeal prevent more widespread use.

In its Electronic Article Surveillance Industry Report, the Home Center Institute says that while EAS is 75 percent effective against theft by daily customers — who also happen to be the most frequent shoplifters — it only deters

"social misfits" from theft 15 percent of the time and professional shoplifters 10 percent of the time.

When selecting an EAS system, retailers look for aesthetics and integration with price tags.

HALLCREST REPORT II

Hallcrest: Fencing Leads 1990 Equipment Revenues

Security fencing, largely a low-technology product category, leads all security equipment categories in revenue for 1990. This is one of many conclusions drawn by the Hallcrest Report II, the most recent, large-scale study of private security.

Conducted by Hallcrest Systems Inc., McLean, Va., under a grant from the U.S. Department of Justice, the benchmark study looks at crime and security resources; the changing relationship of security and police; security personnel and issues; protective services and products; and influential trends.

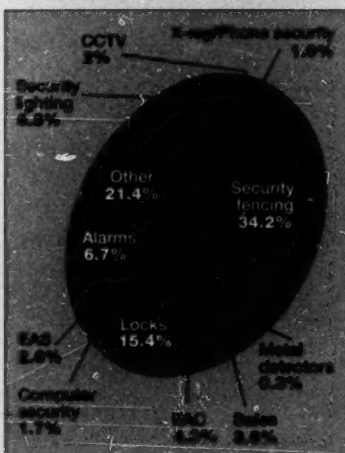
The second largest spending category is locks, while security lighting, alarms, electronic access control and safes trail.

The biggest growth areas from 1990 to 2000, according to William C. Cunningham, project director, will be security equipment, alarm services and consultants/engineers.

The bulk of security spending for equipment currently targets property protection. Systems that do more, have built-in intelligence and connect to other organizational systems

1990 EQUIPMENT REVENUES

Estimated at \$14.3 billion



Source: Hallcrest Report II

The Hallcrest Report II says fencing will lead 1990 equipment revenues.

will increase in attractiveness.

SECURITY begins a year-long series of exclusive reports based upon Hallcrest Report II with a cover article in this issue.

NEWS

Security Wrap-Up: Campus Crime, Biometrics

► The House of Representatives has approved legislation that requires colleges to report campus crimes. House bill 1454 requires schools to collect and disclose data about crime on campus and to inform victims of crime about disciplinary proceedings taken against alleged perpetrators.

► Personal Identification News' Fifth Annual Subscriber Survey shows that the majority of respondents agree that the United States' biometrics and smart card industries are poised for steady growth. The majority of respondents do not think that most corporate computer users will use only passwords for access in 1995. Respondents also do not expect a national ID by 2000.

► Marital and family problems more strongly affect employee productivity than do alcohol or drug abuse, says a survey sponsored by the American Psychological Association. Among small business managers surveyed, 57 percent say productivity suffers as a result of employees' family problems, while 33 percent report loss of productivity due to substance abuse.

WHAT'S HAPPENING TO SECURITY?

As threats spread, private security enters a new "make-or-break" era. Traditional security, at risk, must prepare for new challenges.

By Bill Zalud
Editor

During the 1980s, private security experienced its greatest growth ever.

Yet even in the face of such headway, business crime — and its cost — grew faster. For this and other reasons, organizations with a security function are in the midst of a bench mark stage of evolution. Already picking up steam, changes in the 1990s will diminish in-house staffs, redistribute security decision making inside and outside, and increase reliance upon equipment and contract services.

These and other issues are carefully detailed in *The Hallcrest Report II — Private Security Trends: 1970 to the Year 2000*. Conducted by Hallcrest Systems Inc., McLean, Va., under a re-

search grant from the National Institute of Justice (NIJ), U.S. Department of Justice, the report provides a comprehensive study of security trends to the 21st Century. The complete report is available from Butterworths Publishers, Stoneham, Mass.

The landmark report looks at crime and security resources; the changing relationship of security and police; security personnel and issues; protective services and products; and influential trends.

This is the second time the NIJ has tapped Hallcrest Systems to research the state of private security. In the early 1980s, Hallcrest first conducted large-scale research on the nature and scope of private security and its interaction with law enforcement. A 425-page document, *The Hallcrest Report: Private Security and Police in America*, was published in 1985.

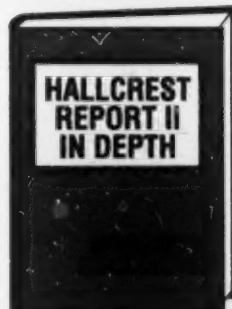
SECURITY begins a year-long, exclusive series of in-depth articles on *Hallcrest Report II* with this interview of the study's project director William C. Cunningham, president, Hallcrest Systems Inc.

While it's hard to measure, what is your estimate of the current cost of business crime?

Unfortunately, we see strong, continued growth. Economic or business crime continues to grow dramatically, especially more rapidly in relation to general and street crime. It is hard to get a handle on the extent of the problem.

The Hallcrest staff looked at every credible source and type of crime. But no one has precise figures.

This lack of solid reporting of losses



SECURITY's In-Depth Coverage

The Hallcrest Report II — Private Security Trends: 1970 to the Year 2000 provides a provocative overview. This interview with

Project Director William Cunningham kicks off SECURITY's extensive coverage. Other articles spotlight John Strachan, CPP, and Clifford Van Meter, who share Hallcrest duties. The report is available in hardcover from Butterworths Publishers, 80 Montvale Ave., Stoneham, Mass. 02180, or telephone (800) 366-2665.

HALLCREST
REPORT II
IN DEPTH

leads to an important *Report* recommendation. We need to standardize and coordinate the tally. The business sector, in collaboration with the government, should set classifications, standards and reporting mechanisms for economic crimes.

Studies in the 1970s by the U.S. Chamber of Commerce, Congress and the American Management Association all reached a consensus: at that time, business crime cost \$40 billion or more a year.

Our projections based upon those studies peg the cost of crime against business at about \$67 billion in 1980 and \$114 billion in 1990. At its current rate, business and economic crime will cost the U.S. economy

\$200 billion by the year 2000.

Whatever the total, the effect is clear: Economic crime is not an inflationary factor; it is inflation. Several estimates tag economic crime as the reason for 20 to 30 percent of small business failures. We do not now have the measurements for business crime as we have for street crime and uniform crime statistics compiled by the FBI. But we need it.

Business and economic crime is growing rapidly. But in what directions?

There are several places of visible emphasis. One is drug trafficking and drug use in corporate America. Business offices and factory floors may be the last uninterrupted avenue of drug trafficking in our country. And

behind the corporate door there's nothing but security to recognize the problem and take action. Drugs are feeding other types of crime such as management fraud, shoplifting and employee pilferaging.

Another visible area of growth is computer-related crimes. Today, it is more costly and it happens more frequently than in the 1980s. Yet here, more than some other target areas, safeguards being developed are impressive. If safeguards are used properly and people trained adequately, computer crime will be more difficult to pull off.

Of course, frauds of all types are increasing. Employee theft remains high — no one said there's less. However, the frequency and cost of certain identified crimes now outpace others.

Tangible assets lost to business crime provide only part of the picture. What are the indirect costs of business/economic crime?

It's even harder to arrive at indirect costs. Yet the impact of these costs plays out in reduced profits and in-

Business crime now costs \$114 billion, a projected \$200 billion by 2000.

creased cost of insurance, security and internal controls.

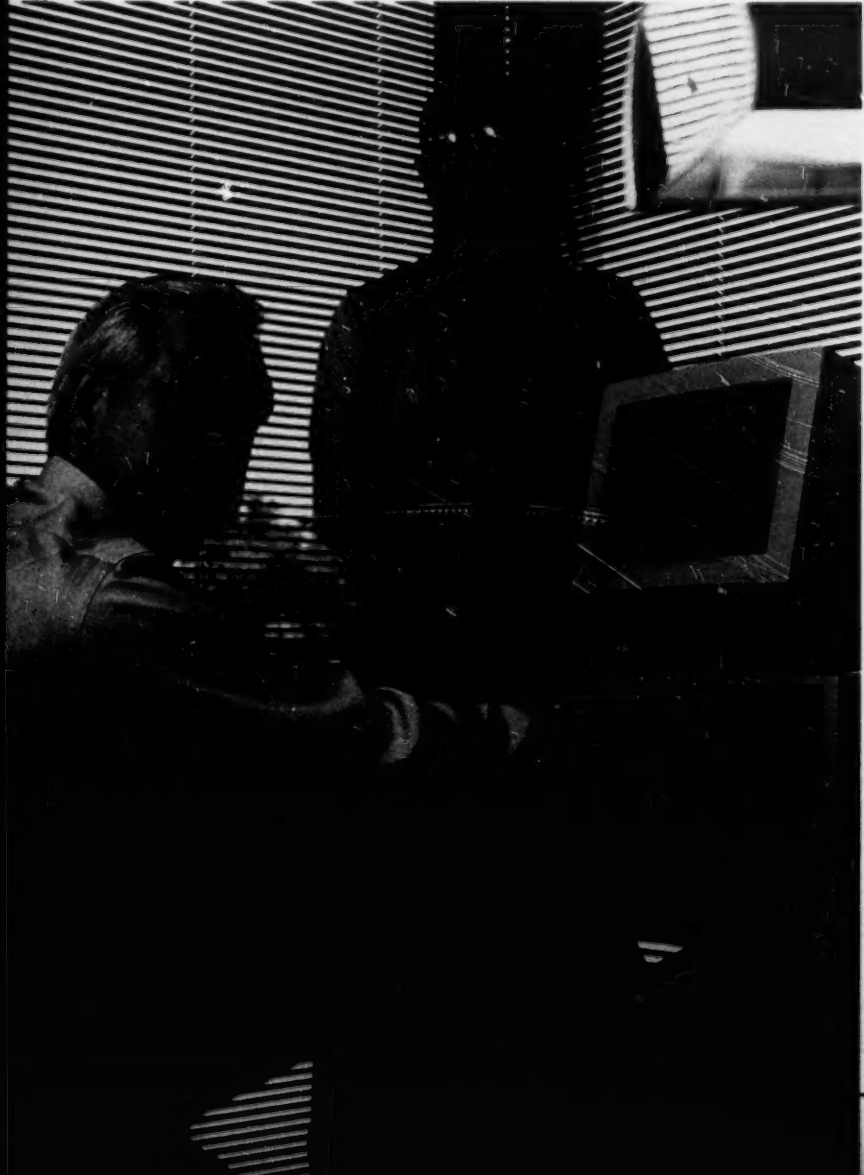
There's also the increased overhead due to theft. When something is stolen, someone often has to reorder, restock, reship, reshelve or redo the whole costly process.

There's the cost to government — passed on to business and the public — including investigations and prosecutions, correctional programs and loss of tax revenue through lost sales tax, untaxed income and tax deductions to businesses sustaining losses.

The public suffers through increased cost of consumer goods and services, reduced employment due to business failure and loss of investor equity.

The biggest indirect cost is liability and today's litigation explosion. Awards and out-of-court settlements cost big money. Through the 1990s, the awards will go higher. The litigation

The Hallcrest Report II authors, John Strauchs, William Cunningham and Cliff Van Meter, studied private security, its present state and future growth through the year 2000.



may lead, however, to meaningful research into the effectiveness of security measures — what works and what doesn't work. What may develop are standards to contain claims of inadequate security.

What is the size of private security in dollars spent and people employed, and where is growth going?

In 1990, there are about 1½ million people in private security. Of that total, about 1 million are in contract security and about 500,000 in proprietary.

Growth in proprietary security has stabilized and will slow, by the year 2000, to show a 2 percent drop. Organizations will increase their security efforts through more contract employees, products and services. Contract security employee growth will almost double the projected national workforce growth in the 1990s.

In proprietary security, 74 percent of employees are officers, a drop of 3 percent compared to 1982. About 18 percent of employees are managers and staff support — up 5 percent.

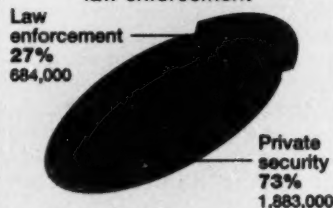
About \$52 billion will be spent in private security this year. Of that amount, \$14 billion will be in proprietary while \$38 billion will be for contract security services and equipment. Within the contract area only, \$26 billion will go for services while \$12 billion for equipment.

Strong performers include security consultants and engineers, equipment and alarms — all with 12 percent annual growth.

With declining proprietary security,

PRIVATE SECURITY EMPLOYMENT: 2000

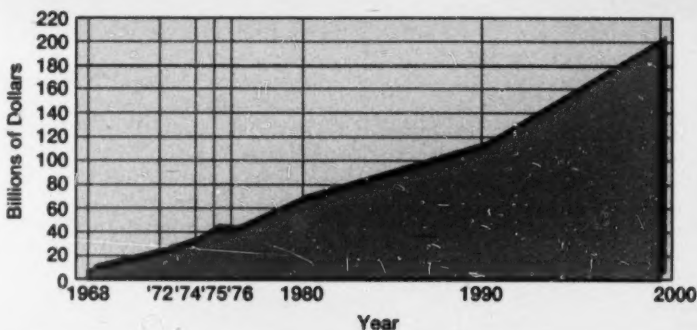
Projected employment vs. law enforcement



Source: Hallcrest Report II

By 2000, private security employees will outnumber law enforcement.

ESTIMATED COST OF ECONOMIC CRIME



Source: Hallcrest Report II

There is a sharp increase in the cost of economic crime, especially since the mid-1970s. The indirect costs also have increased.

downsizing organizations and strong growth in equipment and services, doesn't this squeeze out the traditional security director?

Yes. There's a distinct possibility that products as well as technical, support and consultant services will move outside. Yet someone internally will have to broker this array of protective services and equipment options.

What is emerging is a different breed of security decision maker. Corporate functions are being consolidated. More facility managers now are responsible

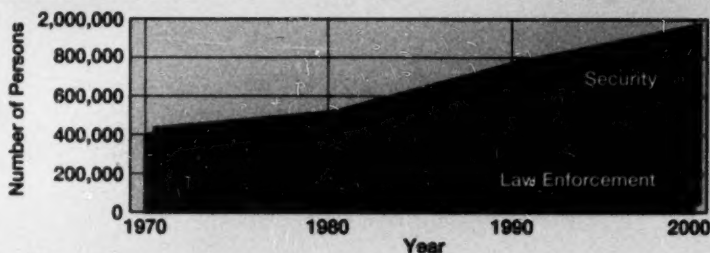
for security, not only at one location, but company-wide. There's more linkage among risk management, security, safety, legal, human resources and internal audit.

There are a lot of security decision makers that are not in the mainstream, not ASIS members. There will be more.

We continue to play out a trend. In the past, corporate security managers largely came from law enforcement and military backgrounds. In the mid-1980s and beyond, many companies were less inclined toward security leadership

SECURITY VS. LAW ENFORCEMENT EMPLOYMENT

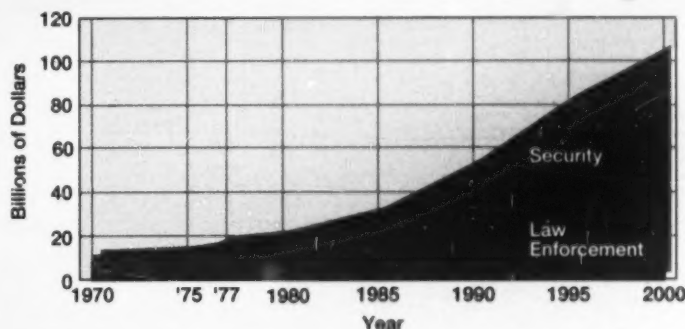
Most growth in private security



Source: Hallcrest Report II

Fast growth in private security compares to slow growth in law enforcement. Business now solves more problems itself.

SECURITY VS. LAW ENFORCEMENT SPENDING



Source: Hallcrest Report II

Spending in private security has outpaced law enforcement since 1977. Privatization may accelerate the trend by shifting some resources.

with this type background. Employers put less emphasis in reactive functions such as managing guards and investigating crimes. They wanted security to design proactive programs and controls to prevent losses.

More often today, mainstream business people are tapped for security. Many previously worked in internal audit, facilities management, risk management, accounting, legal and human resources.

In addition, there has been some management-level trade-off to outside

resources — security engineers and consultants for strategic planning, designing security awareness programs, conducting risk assessment programs. We see a small though growing number of companies using these outside services instead of inside management.

These changes leave some security directors and managers in a bit of trouble. No matter how it finally plays out, it's obvious there will be more career opportunities for people who can manage technology, understand economic crimes and function effec-

tively in business environments.

Officers are the bulk of security employment. Is there a commitment to increasing the quality, training and compensation of security officers?

We are moving too slowly in that direction. The *Hallcrest Report II* documents — in limited samplings — that the negative stereotype of operational security personnel is giving way to younger, better educated people, with more women and minorities. Demographically, private security officers are closing the gap when compared to law enforcement — except for compensation where security makes 40 to 50 percent less.

But there is slow improvement of private security officers. There is slight improvement in compensation and dramatic improvement in educational opportunities thanks to certificate, associate and degree programs. However, there is no noticeable improvement in pre-service levels of training. Generally, we aren't making a lot of improvement in overall quality.

By the way, I don't compare private security officers to law enforcement. They are two separate categories with two separate purposes, and both usually perform different tasks.

Is government regulation helping? Is there a chance the federal government will step in to regulate the industry?

A role for the federal government? It's unrealistic and won't happen. It's a state function. Most responsible security people support state-level regulation but abhor local regulation

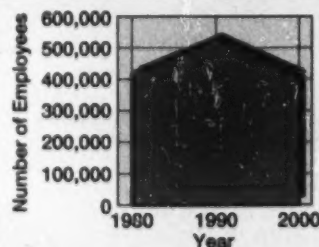
PRIVATE SECURITY EMPLOYEES

Number of employees in the field

Year	Contract Service and Manufacturing Employees	Average Annual Growth Rate	Proprietary Security Organization Employees	Average Annual Growth Rate	Total	Total Average Annual Growth Rate
1980	556,000	N/A	420,000	N/A	976,000	N/A
1990	965,000	6%	528,000	2%	1,493,000	4%
2000	1,473,000	4%	410,000	-2%	1,883,000	2%

Source: Hallcrest Report II

PROPRIETARY SECURITY EMPLOYEES



Source: Hallcrest Report II

Overall growth will slow in the next ten years due, in part, to slowing of in-house growth.

There's a projected decline in proprietary security through 2000.

1990 EXPENDITURES

Estimated \$51.6 Billion



Source: Hallcrest Report II

Equipment, in-house overhead and contract officers will grab more.

as redundant and a nuisance.

Most states regulate some aspect of private security. What the Private Security Task Force said 15 years ago is appropriate today. About licensing and regulations, they found "some good,

GROSS ANNUAL REVENUES/EXPENDITURES

For private security field

Year	Private Security Revenues (Services & Equipment)	Average Annual Growth Rate	Proprietary Security Organization Operating Costs	Average Annual Growth Rate	Total	Total Average Annual Growth Rate
1980	\$13,000,000,000	N/A	\$6,250,000,000	N/A	\$19,250,000,000	N/A
1990	\$38,000,000,000	11%	\$13,600,000,000	8%	\$51,600,000,000	10%
2000	\$88,000,000,000	9%	\$16,000,000,000	2%	\$104,000,000,000	7%

Source: Hallcrest Report II

There's projected slowing of spending during the 1990s, especially in proprietary costs, in relation to other categories.

some of limited value, most lacking uniformity and comprehensiveness."

Generally, our study confirms this observation. Most people believe state licensing and regulation does not assure good security personnel and sound business practices. But most also see the need for government regulation anyway.

Lacking any strong security industry regulation, there's no alternative but state regulation.

Monitored services have interesting

growth potential. Where do you see the alarm industry today? And what does it look like by the year 2000?

There's solid growth. Several Hallcrest sources say that as much as 10 percent of residential properties have alarm systems. There's evidence that residential installations may double — then stagnate — in the next eight to 10 years. If the Baby Bells get in, there could be an explosion, triggered by sharp price decreases.

There are also indications that com-

About the Hallcrest Authors



William C. Cunningham

William C. Cunningham is president of Hallcrest Systems Inc., a research and consulting firm that provides a broad range of management and technical assistance to criminal justice, public safety and corporate clients. Cunningham was co-author of the first study — the Hallcrest Report: *Private Security and Police in America*.



John J. Strauchs, CPP

John J. Strauchs, CPP, is president of Systech Group Inc., Reston, Va., which provides security consulting, specializing in the development of contract/construction documents in loss prevention. Strauchs helped pioneer the concept of security engineering and encourages organizations to build security into facilities.



Clifford W. Van Meter

Clifford W. Van Meter is director of the Police Training Institute, University of Illinois, Champaign. Van Meter was part of the first Hallcrest study and, earlier, was executive director of the Private Security Task Force. A respected authority, he also chaired the Department of Law Enforcement Administration at Western Illinois University, Macomb.



mercial monitoring is currently at near saturation. Those businesses that want, got.

But there is a looming monitoring problem: false alarm response. It's a massive waste of public funds when fire and police agencies must respond to the current level of false alarms. An estimated 97 to 99 percent of all alarms are false!

The false alarm problem gives law enforcement a negative image that inhibits further cooperation with private security.

Is private security moving to more automated protection, trading people for systems?

Yes. There will be more automated systems doing things better than before. We aren't convinced they'll replace the human element. Automated, technically sophisticated, monitored systems need a human being to decide upon the type of response. By the way, the earlier Hallcrest study predicted greater security use of robotics than has occurred. Trending is intelligent guesswork, which reminds me of the old saying: He who lives by the crystal ball must learn to eat ground glass sometimes.

Is America moving to more use of private security over public law enforcement? What are the ramifications?

Federal, state and local government, in general, is turning more to privatization than ever before. The evolution is most apparent in non-crime areas. In terms of public law enforcement and corrections, the pace of change is very slow.

Turf issues still need resolution. There's growing interest. Research shows that more than 80 percent of police activities are non-crime related. Law enforcement has two strategies: transfer some responsibilities to the private sector and contract with private security for some non-crime police support functions.

At the same time, some segments of private security are asking for and re-

SECURITY COMPANY EMPLOYEES

Employees working in security service and manufacturing firms

Segment	Employees in 1980	Percent of Total 1980	Employees in 1990	Percent of Total 1990	Average Annual Growth Rate 1980-1990	Employees in 2000	Percent of Total 2000	Average Annual Growth Rate 1990-2000
Armored Car	11,500	2%	15,000	2%	3%	16,500	1%	1%
Alarm Companies	55,000	10%	120,000	12%	8%	250,000	17%	8%
Contract Guards	330,000	59%	520,000	54%	5%	750,000	51%	4%
Private Investigators	45,000	8%	70,000	7%	4%	90,000	6%	2%
Consultants	1,200	.2%	2,900	.3%	9%	6,200	.4%	8%
Locksmiths	45,000	8%	69,600	7%	4%	88,000	6%	2%
Manufacturers & Distributors	55,000	10%	88,300	9%	5%	132,000	9%	4%
Others	13,500	2%	79,500	8%	19%	140,000	10%	6%
TOTAL	556,200		965,300		7%	1,472,000		5%

Sources: Hallcrest Report II

While guards have most employment, alarm company and consultants/engineers outpace average growth in terms of employees.

ceiving limited police power — isolated events or a trend?

There will be more. We estimate that about 25 percent of security personnel have some form of limited authority granted by government. If more responsibility is shifted to private security as indicated, we believe more will receive limited police powers to perform duties.

This, however, doesn't mean there will be more armed security personnel. Armed security will continue to drop to about 10 percent in 1990 and to 5 percent by 2000.

More in a de facto manner, American business seems to be moving toward a private justice system. Your thoughts on business use of internal mechanisms over its traditional reliance upon the public criminal justice system.

For some time, much of the economic crime inflicted upon business has been resolved privately. Let's face it: If all the crimes against business were

dumped into the public criminal justice system, it would collapse in a day. There's so much economic crime.

But there still is little known about the extent, effectiveness or fairness of private justice. Moreover, there are reasons the business community frequently wishes to resolve crimes internally and quietly. They do not have confidence in the public criminal justice system — it's too slow, too cumbersome and exposes sins publicly. Using the public criminal justice system opens business up to many rules and disclosures. Juries can be unsympathetic to business crime.

The kinds of sanctions that business uses — restitution, suspension and firings — all are common, but there's no assessment of how much is settled or settled fairly.

We need to both determine the amount of unreported crime and assess the deterrent value of private justice. □

By far, computer and communication technology are the dominant forces in security equipment. Microprocessors, sophisticated software and graphic-based displays aim at improving gear. Better, faster, more diverse communication — beyond twisted pair and coax — target instant transmission and lower error rate.

"Change is speeding up too. Look at how long it took to go from tubes to semiconductors — and then bang," says Manuel Pires, president, Morse Watchmans Inc., Waterbury, Conn.

Today's bang: networked intelligence. Stand-alone systems are peaking. "Multi-user, true distributed processing is ascending," says Jim Spencer, vice president of marketing, Casi-Rusco, Boca Raton, Fla.

Against the wind is CCTV technology, where "improvements are almost totally dependent upon the CCD chip, consumer electronics and Japan," observes Dr. Richard Groves, president, Navco Security Systems, Anaheim, Calif.

In the long run, everything will be connected; most everything will be digital and possess intelligence. In fact, much of the new technology is old. New technology typically catches on only after prices fall.

"The key is getting more for less," says Tom Nicolette, president, Knogo North America, Hauppauge, N.Y. The bottom line: more gear; fewer people; quicker, more accurate information.

The Temptation of Technology

*Advances in technology
revolutionize security.
But at what cost?*

■ Entertainment Industry Pushes CCTV Technology; Connections Gain

"The camera side is driven by the consumer camcorder business," relates John Schulte, vice president of marketing and sales, Javelin Electronics Inc., Torrance, Calif. The 1/2-inch chip, solid state and more color are indicators

Video switching, alarm response and camera control are merging. Matrix switching and better programming handle more and do it more easily.

Quads are big. "And multiplexing and multi-video recording are hot," says Schulte.

The color barriers, beyond price, are falling. "In the past, switchers could not pass color. Now many are color compatible. Time lapse recorders are color compatible; there are color video printers. And newer color cameras are more light sensitive," says Schulte.

There are now a variety of modes of transmission. "Fiber optics is the wave

of the future," Schulte contends. "New construction now goes in with dark fiber. The architects know that fiber will be turned on one day."

Intensified CCD cameras will replace SIT and ISIT. Wireless CCTV, according to the experts, has inherent FCC limitations, while microwave "is somewhat successful but limited," adds Schulte.

■ Reliability, Ease of Use Spur Testing Service Improvements

Today, testing can refer to everything from pre-employment honesty tests to random urine tests for drugs.

Technology plays a big part in ease of use and reliability.

"People answer more truthfully to a computer than to a person," says Richard J. Phannenstill, CPP, developer of Computerized Employment Applications, Milwaukee.

Joe Orban, director of customized services, London House, Park Ridge, Ill., says that overall, technology "re-

Analysis Calls for Computer Help

quires companies to consider more details of the screening process." Companies are also having to do more with the raw information. Says Bob Campbell, Reid Psychological Systems' executive vice president of information management, Chicago, "Companies will begin to do their own statis-

tical analysis to figure out trends."

On the drug testing end, top-notch labs have gas chromatography/mass spectroscopy (GC/MS) equipment.

Just emerging from law enforcement is hair analysis. It uses a more time-consuming process and different, expensive equipment. It's slowly catching

on because it is less intrusive. But it must overcome established urine analysis, already institutionalized by government certification.

Automation Influences Guard Service Offerings and Personnel

Robo-security is approaching.

Guard tour equipment now tracks officers and response. Some are self-contained time capsules — when hooked to a computer and printer, tour systems audit performance for liability and personnel needs.

Technology plays a big part in ease of use and reliability.

Changing applications are no problem. Downloading — a hot item everywhere — makes change fast and simple. Says Pires of Morse Watchmans, "Our customers tell us what they want, and we program over the telephone."

Analysis, from on-tour decision making to human resources planning, calls for computer help.

Guard tour systems and operations analysis are bridges to personalized computers for officers, networked to supervision and on-line assistance.

Other, typical security technology — CCTV, electronic access control and integration — impacts officers. Here is where advances augment or even replace people with machines that observe, identify, check in and out and welcome visitors with a digital voice if not a human smile.

Badges to Cards to Biometric ID: Identification Gets Personal

True or false: Worldwide, there are more ID cards than credit cards.

If you say "true," you agree with Ken Quinn, vice president, Datacode Systems, Cleveland. "More countries and businesses require citizens to possess some form of identification," he says.

Buck Rogers and the Paperless Office

Miniature lenses at the end of a fiber optic cable view the office entrance.

Automated, voice-activated access control personally welcomes you to work, opens the door and turns on the electricity and computer connection in your work pod.

You sit down, pick up your pen-like stylus and write on a flat screen that enters and processes work into the company's networked system.

Welcome to tomorrow-land, security style. There's only one system — it's called the office, and it's paperless. Some of tomorrow is already here today.

At the new Los Colinas, Texas, monitoring facility of Westinghouse Security Systems, there is a seamless, paperless office.

"Our aim is to be the lowest cost

provider of the highest quality service," says Peder Kolind, president and chief executive officer, Westinghouse Security Systems.

"One way to achieve that goal is to have a paperless office so we can handle 1,000 new installations a day. The paperless office allows us to more effectively handle work and smoothly connect with others. Nothing is lost."

Another Buck Rogers innovation is adaptive learning. "There will be more embedding of decision making and learning skills into systems," points out Jim Spencer, vice president of marketing, Casi-Rusco.

Other cutting edge developments include voice recognition, already seen in biometrics; artificial intelligence; and multimedia for alarm display and training.



Peter Kolind (seated), president and CEO, Westinghouse Security Systems, believes a paperless office will increase productivity.

Changing Applications Are No Problem

Rise Above Technology's Downside

Hallcrest Report II projects that security will spend \$14.3 billion on equipment before the year is over. But is security's 1990 technology tab really dollars well spent?

Ira Somerson, CPP, president, Loss Management Consultants, Plymouth Meeting, Pa., says the proliferation of security technology masks the "real" challenges.

"Security is a people problem and it always will be," says Somerson. "Sometimes technology should be part of a protective scene, but it obscures what security's about — managing people and the corporate culture and protecting assets.

Somerson says that if employees are going to accept technology, they must own its design. He suggests that an employee task force — rather than security decision makers — design systems.

Employees and visitors are often intimidated when they're expected to use or comply with new security technology or procedures. A little research by the security decision maker goes a long way toward implementing smart purchases.

"There may be a difference between what you'd like to buy and what employees will tolerate," says Barbara Zech, corporate security

awareness coordinator, Texas Instruments, Dallas. "It's security's business to take a customer service approach and fit the technology to the facility and people. The more user friendly the technology is, the more apt people are to use it."

Decision makers who buy sophisticated equipment with the sole intention of saving money may be disappointed, however.

Tom Roemer, CPP, security consultant, Buffalo Grove, Ill., says, "You end up paying higher salaries for existing employees who can operate today's sophisticated equipment."

Security badges hark back to the early 1950s. Recent advances in badging center on new materials and inking that enforces temporary use cards — making them void after a set period of time.

Magnetic stripe cards and Polaroid's first ID system — which took color photos — emerged in the late 1960s. Proximity cards, for hands-free convenience, followed in the 1970s. The latest: dual tech cards which combine proximity and bar codes or magnetic stripes. Soon to emerge: photobonding, which creates a picture on a perfectly smooth card, and greater use of holography.

Smart card and biometric technologies are emerging more slowly. High cost and intrusion operation will slow down development and use.

CCTV has identification uses. Video ID, already intensely competitive, boasts improved operation and unlimited digital storage.

■ Buyers' Market Advancements in Electronic Access Control

Distributed intelligence, flexible platforms, graphic interfaces, smooth integration. Today's technology points to a move away from the stand-alone nature of these systems.

And "technology is, after centuries, finally starting to replace mechanical

locks," adds David Schuldt, president, Casi-Rusco.

Yet hardware, software, readers and cards — sold by scores of companies, some that manufacture — will result in a buyers' market, according to Tom Cook, communications manager, Mosler, Hamilton, Ohio.

"The survivors will invent unique, cheaper products, and users will benefit from the competition," Cook says.

Everything will be connected and digital.

There's also a redefining of the industry, according to Kirk Georgia, senior product manager, Casi Rusco. "Industries such as electronic article surveillance — a retail application looking outward — are merging with security vendors as the lines blur."

Access control also increasingly integrates as software grows more sophisticated. Look for icons and alarm graphics programmed into systems. "This technology complements the changing labor force," points out Schuldt.

"Technology will make networking, distributed processing and higher level interface with CCTV, energy control and other systems more affordable and much easier to accomplish," says Tony Wilson, senior marketing communications specialist, Cardkey Systems, Simi Valley, Calif.

■ Internal, External Communications Diversify for Flexibility and Power

Security's communications needs are evolving, and so is use of communications equipment.

Two-way and trunked radio were the only portable ballgame until several years ago, when cellular found a new niche. SECURITY's Data Bank shows that 60 percent of security decision makers use cellular. In addition to verbal communication, cellular is also used for fixed purposes such as alarm signaling. It provides backup and primary communications in some situations.

Despite its appeal, cellular shares the communications spotlight with tried and true two-way radios. A healthy 95 percent of security departments — including 73 percent which also use cellular — continue to employ two-way radios. Two-way radio manufacturers have secured faithful followings by streamlining their radios and equipping them with privacy features and DTMF keypads, which allow users to dial telephone numbers.

Internal communications are facilitated with intercom systems. Wireless systems and intercoms equipped with video monitors are among the latest products in this line. Audio will blend into the emerging integrated system as improvements continue.

Change is Speeding Up

■ Muscle and Brains Combine for Greater Intrusion Protection

Outdoor protection works to keep intruders outside a facility's perimeter.

The latest fences provide subtle, yet high security. One features an arch that causes climbers to fall off the fence. Hydraulically-powered underground barricades protect facilities

from vehicle terrorist assaults.

Facilities use various combinations of audio and glassbreak detectors, photoelectric beams, motion detectors, PIRs and dual technology sensors to detect intruders.

Alan Colson, product manager, Sentrol, Portland, Ore., says, "Manufacturers need to commit to research, development, testing real applications and reliability to move toward smarter sensors."

TECHNOLOGY VS. MANPOWER More Equipment, Less Staff?



Source: SECURITY

In the last year, 40 percent of security operations report increased reliance on equipment over human resources.

TECHNOLOGY COMMITMENT By Type of Business

Average	40%
Industrial	62%
Financial	56%
Government	29%
Retail	17%
Institutions	13%

Source: SECURITY

Industrial and financial security increased their reliance on technology most often.

NEW TECHNOLOGY TAKES HOLD

	Use in 1989	Use in 1988
Solid state CCTV	41.8%	21.3%
Drug testing	32.4%	20.6%
PC security	27.6%	19.9%
Quads	24.4%	12.5%
Dual technology	23.6%	9.6%
Remote access control	21.8%	11.8%
Wireless	21.3%	8.8%
Proximity	15.6%	7.4%
Video motion detection	14.2%	7.4%
Motion-sensing lights	13.8%	5.9%
Fiber optics	12.9%	9.6%
Color CCTV	10.7%	8.8%
Slow scan	10.7%	5.1%
Encryption	10.2%	5.1%
Long-range radio	7.6%	3.7%
Derived	7.6%	3.7%
Downloading	6.2%	5.9%
Biometrics	4.4%	4.4%

Source: SECURITY

Emerging technology is accepted slowly. Security often waits for reliability to increase and prices to fall. Total equals more than 100% due to multiple answers.

■ Monitoring Scores With More Services, Automation

The aim of improvement in alarm monitoring is more connections, fewer false alarms, more automation and especially "more creative services," says Craig Leiser, vice president of marketing and dealer operations, The National Guardian Co., Greenwich, Conn.

The pot at the end of current modernization is attractive. "If done right, we'll be the hub of security, information handling and control for business and industry," contends Brian McCarthy, vice president of marketing and product supply, ADT Inc., Parsippany, N.Y.

User site equipment is gearing up with store and forward capability, multiplexing and piggybacking of signal types. It helps both ends. "There's also derived channel, backup and redundancy with cellular telephone," adds Leiser.

Monitoring services are now expanding their capabilities through computer and communication enhancements. The new generation will be "a big pipeline for serious analysis with intelligent equipment linked to intelligent networks," says McCarthy.

■ Combining Security, Facilities and Management Needs

"We're after the same end — fully integrated systems that comprise security, facilities and management," admits Javelin's Schulte. Right now, installed technology is largely stand-alone or interfaced. "Diverse equipment and systems talk to each other but most need separate control panels.

"Everything is merging based upon an operating platform and emerging protocols," says Cusi-Rusco's Schuldt. "With sophisticated software at the heart" adds James R. Vinson, director of marketing, Northern Computers, Milwaukee.

For the small-to medium-sized user, integrated systems can pass dividends by merging separate security control systems into one. □

Compiled by Brenda Moss, Staff Editor; Bill Zalud, Editor; and Rebecca Russell, Senior Editor

C1850-12A

AN IRVING-CLOUD PUBLICATION

SECURITY

THE MAGAZINE FOR THE SECURITY PROFESSION

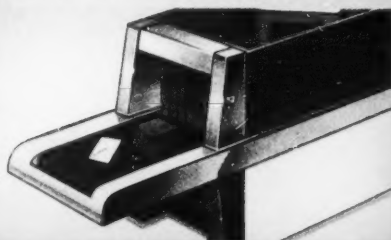
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Steve Garrison
Security Supervisor
Atlas Gold Mining Inc.

SECURITY^{T.M.}

THE MAGAZINE FOR SECURITY DECISION MAKERS

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Fire safety is a priority. Field experts detail the issues surrounding this high risk security challenge.

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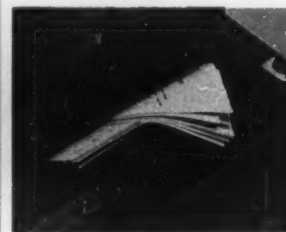
Steve Garrison, security supervisor, leads the security effort at Atlas Gold Mining Inc., Eureka, Nev. (p. 40)

SERVICES

- 67 Security Prepares for Emergency Response**
Environmental concerns push emergency response into security's arena.

EQUIPMENT FOCUS

- 70 Bomb, Metal Detection Equipment Identify Hazards Before It's Too Late**
Industrial use of detectors catches on.
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More than 45 products, including this shredder, are featured. (p.76)

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SECURITY (ISSN 0890-8826) is published monthly, except for March and August when two issues are published in national and separate editions, by The Cahners Publishing Company, A Division of Reed Publishing USA, 275 Washington St., Newton, MA 02158-1630. Terrence M. McDermott, President; Charles E. Moodie, Senior Vice President/General Manager, Chicago Division; Jerry D. Neith, Senior Vice President/Publishing Operations; J.J. Walsh, Senior Vice President/Finance; Thomas J. Dellamaria, Senior Vice President/Production and Manufacturing; Ralph Knapp, Vice President/Human Resources. Circulation records are maintained at Cahners Publishing Company, 44 Cook St., Denver, CO 80206-5800. Phone: 303/388-4511. Second-class postage paid at Denver, CO 80206-5800 and additional mailing offices. Postmaster: send address corrections to SECURITY P.O. Box 173377, Denver, CO 80217-3377. SECURITY copyright 1990 by Reed Publishing USA; Ronald G. Segel, Chairman and Chief Executive Officer; Robert L. Krakoff, President and Chief Operating Officer; William M. Platt, Senior Vice President. Annual subscription rates for non-qualified people: USA, \$59.95; Canada/Mexico, \$69.95; other countries, \$115 for surface mail and \$165 for air mail. Special issues, including product directory, are \$50. Except for special issues where price changes are indicated, single copies of regular issues are available for \$10, \$14 and \$18 (USA, Canada/Mexico and foreign). Please address all subscription mail to SECURITY, 44 Cook St., Denver, CO 80206-5800.

SECURITY INDICATORS

Trends and forecasts for determining loss prevention needs.

MARKET REVENUES

1993 Revenue Projection: Guard Services, Locks, Fire Protection Retain Market Grip

The U.S. commercial and industrial security market — estimated at \$11.17 billion for 1989 — will reach \$13.86 billion by 1993, says a study from Frost & Sullivan Inc., New York.

"The U.S. Commercial/Industrial Security Equipment and Services Market" finds private guard and investigative services comprise the largest overall dollar category with more than \$5 billion in 1989 revenues and a projected \$5.47 billion for 1993. Central station service revenues will mount quickly, reaching \$1.9 billion by 1993, the survey says.

Dennis Corban, project director for Frost & Sullivan, says optimistic service projections reflect security's steady reliance on human resources.

"Technology at its highest level can't replace an intelligent on-site assessor," Corban tells SECURITY. He attributes service companies' top revenues to the

higher salaries that increasingly professional officers command.

Of the equipment categories, fire protection and non-electronic access control — including locks and keys, combination locks, and fences and gates — are the top sellers.

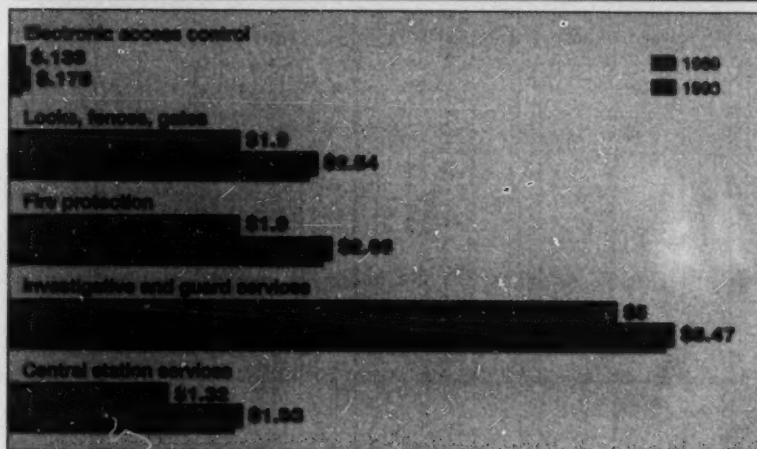
Projections for non-electronic access control products far exceed the outlook for electronic counterparts. Corban links the higher non-electronic revenues to a more stable price structure.

"The decreasing price of electronic technology — not a shrinking market — accounts for lower revenues," Corban says. "Stable sales and stable prices keep revenues up for fences and locks."

End users who spent the most on equipment and services in 1989 — commercial banks, manufacturers and the government — will continue to purchase the most equipment and services in 1993, the survey projects.

PROJECTED EQUIPMENT AND SERVICE REVENUES: OPTIMISTIC

In billions of dollars

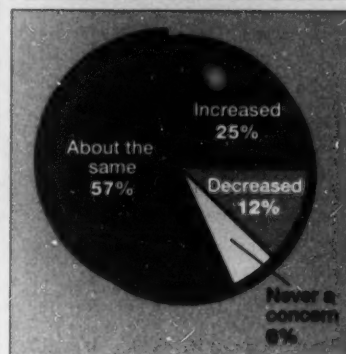


Source: Frost & Sullivan

Investigative and guard services reap the highest revenues in the overall security market. Locks, fences, gates and fire protection lead in equipment revenues.

WORKPLACE DRUG ABUSE

Compared to 1989



Source: SECURITY

Evidence of drug use among employees has shifted moderately since last year.

DRUGS

Security: Workplace Drug Concerns Stabilize

Drug abuse among employees remains a concern for most security decision makers, says SECURITY's Third Quarterly Telephone Survey.

Evidence of drug and alcohol use among employees is about the same as it was last year for 57 percent of respondents. Another 25 percent cite an increase in employee drug use, 12 percent a decrease. Workplace drug use has never been a concern for 6 percent.

Respondents representing industry most often report a decrease in drug use, at 17 percent. Evidence of drug use increased most dramatically for retail; 50 percent of retail security decision makers say evidence of drug and alcohol use among employees has increased in the last year.

The total number of people employed by organizations also affects workplace drug use, according to the survey. Among organizations reporting an increase in drug use, 44 percent employ less than 500. Organizations with between 1,000 and 5,000 employees most frequently experience a decrease, at 17 percent.

EMPLOYEE THEFT

Employee Theft Tab Grows, Reporting a Factor

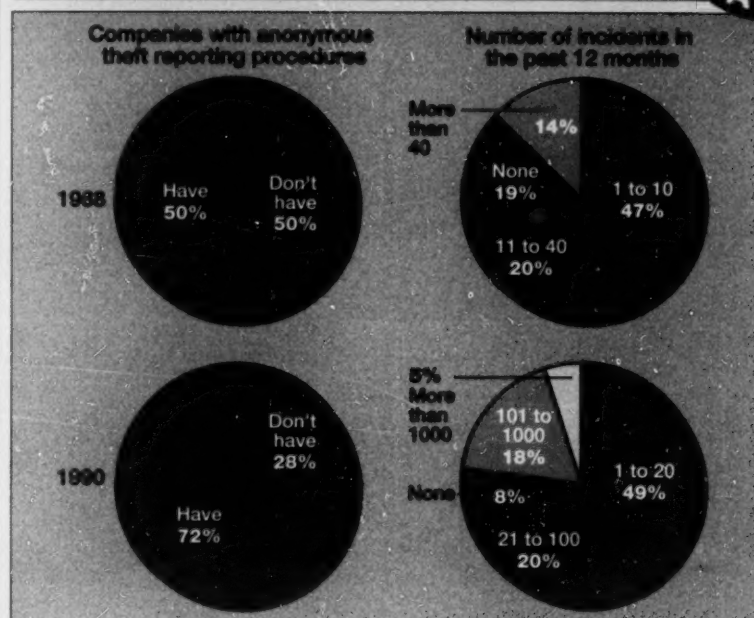
From pencils to PCs, an increasing amount of property finds its way through the workplace door via the hands of employee thieves. So says SECURITY's Third Quarterly Telephone Survey of security decision makers.

SECURITY's 1988 Employee Theft Study provides a basis for comparing two theft factors: the number of known employee theft incidents which have occurred in the past year and the number of companies which have anonymous theft reporting procedures.

Employee theft frequency rose considerably in two years, the survey shows. Just 14 percent of respondents experienced more than 40 incidents in 1988; 38 percent saw between 21 and 1,000 incidents in 1990.

The hefty increase in companies with anonymous theft reporting procedures contributes to the rising number of known incidents. Seventy-two percent of organizations implemented an anonymous reporting policy in 1990, compared to 50 percent in 1988. Among retail respondents, 100 percent implemented such a policy. Institutions are second at 76 percent.

EMPLOYEE THEFT: REPORTING, INCIDENTS INCREASE



Source: SECURITY

The number of known employee theft incidents significantly increased between 1988 and 1990. More theft reporting procedures help reveal thieves.

FIRE PROTECTION

Fire Equipment Maintenance: Security Shares Responsibility

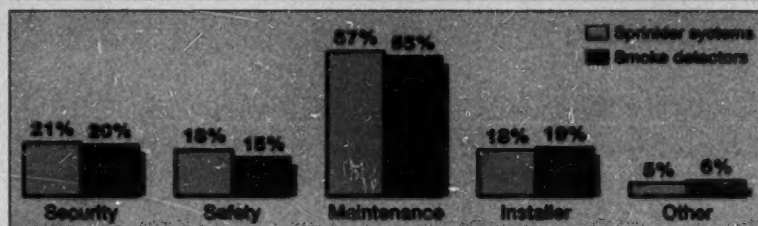
Maintenance personnel — not security or installers — usually maintain fire protection sprinkler systems and smoke detectors, says SECURITY's Third Quarterly Telephone Survey.

Security's involvement with fire protection maintenance varies by organiza-

tion type. In retail, 38 percent of security decision makers say their department maintains both sprinklers and smoke detectors. Institutions often assign this task to security.

Safety personnel employed by the government maintain fire protection equipment nearly half the time. Retail, finance and institutions often call upon installers to maintain fire protection. For more on this topic, turn to this month's special section on fire protection and safety.

WHO MAINTAINS FIRE PROTECTION EQUIPMENT



Source: SECURITY

Maintenance personnel — not security — most often maintain sprinkler systems and smoke detectors. Safety personnel and installers also perform this task.

NEWS

Security Wrap-Up: Computer Security, Drug Testing

► The National Security Institute reports that the Information Systems Security Association (ISSA) has developed guidelines to help corporations determine the value of computer data. The guidelines help assess the cost to firms when information is lost due to theft, down time or other events.

► Employee awareness about drug testing contributes to a decline in the number of employees who test positive for drugs, according to SmithKline Beecham, a Philadelphia-based drug testing firm. Thirteen percent currently test positive for drugs, down from 18 percent three years ago. The bad news: Three of 20 workers are unable to abstain from drugs long enough to pass a scheduled test.

► SECURITY's Data Bank is your source for recent, useful industry statistics. For more Data Bank statistics, turn to ENDPIECES, where you'll find October's Business Crime Index. SECURITY's exclusive Business Crime Index tracks the number of security incidents reported quarterly.

STEPPING FORWARD

With the mission in transition, security takes next, tentative steps. Yet looming department consolidations and downsizing could slow progress.

By Bill Zalud
Editor

After two decades of sometimes spectacular growth, security now faces a hitch along the way. Even with budget dollars and more clout, there's increased uncertainty over bottom line results. Coupled with pervasive organizational changes, security's near-term future seems tied to overcoming the doubts. The 1990s, compared to the previous two decades, will shepherd slower growth as the security mission adjusts.

This uncertainty shapes up as security's toughest test. From results of SECURITY's 1990 Profile study, it's clear that the men and women who protect a company's assets are eager for the challenge.

It's a chance to step forward.

Security decision makers throughout the country already report an expanded menu of things to do for the company. And there's more decision makers with policy-making responsibility higher up in some organizations.

Yet progress is tentative. Broader-based tasks, coupled with packaged services and smarter gear, may convince some firms to consolidate, downsize or outsource protection needs, according to SECURITY's 1990 Profile study.

In a Nutshell

An annual, national study of all types of organizations, the Profile includes mailing questionnaires to a representative sample of SECURITY readers. The sample closely reflects the population of professional security decision makers in the United States.

- The Profile highlights an established link between security and safety and a growing link between security and facilities management — where many control and service functions are consolidating. While about three of four decision makers describe their job as security management, about 13 percent now say they are facilities and operations management.
- There's more sharing of security with other tasks. About half devote 75 percent or less of their time to security — spreading out to other, sometimes unrelated company duties.



Forward thinking security decision makers tend to build upon traditional security successes as they branch out while using more equipment and outside services.



Beyond the Numbers: Comfortable With Roots

Brad Feinberg, manager of security and safety at one of the East Coast's largest cold storage and distribution operations, brings the numbers to remarkable life.

Fitting the typical niche within SECURITY's Profile study, Feinberg is anything but typical when it comes to results. He successfully protects assets, manages

security technology, understands economic crime and knows his employer's business goals.

Feinberg steps forward carefully. His caution mirrors the comfort many security decision makers have in their law enforcement roots.

For example, an overwhelming 83 percent agree that a law enforcement background is helpful in private security. Such loyalty fights the contention that security needs more of a business orientation.

Private security still offers most long-term career rewards, with 61 percent reporting that they'll stick with the field until retirement time.

Yet the evidence mounts: a new breed is emerging, and stepping forward — even in the face of change.

THE SECURITY MISSION ADJUSTS

- There's movement upward. While most decision makers (70 percent) are middle managers of security or loss prevention, about 8 percent now say they are top management.

- Responsibilities are enlarging and diversifying rapidly. Nearly half of security departments took on additional assignments — some in rather alien territory — during the past year.

Obviously, most have responsibility for typical tasks — investigations, for example. Almost half have safety too. About one-third handle compliance and executive protection. One in 10 directs mail services, facilities management and meeting planning.

- Programs involving security continue to proliferate, too.

"Security's expansion will encompass almost every conceivable approach to loss prevention and protection of assets. It's very broad," says John D. Case, CPP, president, John D. Case & Associates of San Diego.

More than eight of 10 organizations have security and safety awareness pro-

grams as well as new employee orientation and disaster planning. Yet there's variation within business and industry as security directs some programs while merely is an involved partner in other programs.

- Caught up in such change, security feels additional pressure from above to increase performance.

Downsizing, outsourcing and consolidations make for an uncertain future.

SECURITY's Profile finds more firms measuring security performance with Management By Objective and formal presentations to top company officers. Such scrutiny goes beyond the typical evaluation with a supervisor.

- The average security department budget continues to increase slightly. In 1990, it's \$335,000 as compared to 1989's \$314,397.

- A lull in staff cutbacks may be ending. The average security department is about 11 people — a figure that has not changed much in three years. Yet the recently-released *Hallcrest Report II* predicts a reduction to 8.8 people per department by the year 2000.

- With overhead under pressure, more money goes for equipment and services.

Not surprisingly, keys and locks, fire protection and communications equipment are the most often used security measures. More than seven of 10 departments also use alarm monitoring, investigations, safes and access control in some way.

About 69 percent of departments participating in the Profile study have security officers.

- Turnover at the top of security is low but accelerating. On the average, a security decision maker has been in his or her position for 7 years and with the organization for about 10 years. The national average for turnover is 4.7 years.

Yet, increasingly, and notably this year, there's more interest in promotion, especially outside a person's current employer.

Changing times are challenging and potentially dangerous: the mission shifts, turnover — even at the top — accelerates, staff-reducing technology and services gain.

Decision Making Shifting

The most compelling Profile point: Security decision making itself is moving up and down and — sometimes — outside organizations. No matter the direction, the move can be a step forward. But dangers exist.

When security moves up, it tends to lose its identity, many times blending into other, already existing functions.

When it moves down, security handles more pedestrian tasks.

Downward motion may signal a reduction in overhead. "The director leaves; the assistant gets promoted — but as a manager not a director," says Read Hayes, president, LP Specialists, Winter Park, Fla.

Pass-Along Security

There's also downward movement that really distributes security into a company's neighborhoods, much like computer management in the 1980s.

"Several progressive security departments, rather than increasing staffs,



Diversifying Services

Tom Lekan, corporate director of security and loss prevention, Nestle Enterprises Inc., moves forward by diversifying into a host of services.

Nested in the legal area, Lekan tailors services and consultant advice to autonomous Nestle companies.

Using an efficient, flexible and small staff, Lekan depends on careful analysis thanks to a computerized security data base and a crisis management plan.

There are numerous partnerships. In particular, loss prevention has its own design group that works to design security into structures. "A good loss prevention program lets you talk the same language as upper management," he says.



Managing Facilities

Sandra Kerin, vice president, Sage Realty Corp., manages a business community within New York City high rises. Using forward-thinking programs, polished officers and effective technology, Kerin provides office tenants with a safe and secure working environment.

Kerin supervises field activities at various buildings in New York City. At the same time, she brokers arrangements with service firms.

Aim is reasonable protection that's not overly inconvenient. Her goal is helped through inventive security awareness programs.

"I work with property managers and their staffs," says Kerin. Critical systems include life safety, access control, intrusion and surveillance.

train location representatives, with some security responsibilities. These location security administrators usually have other, primary tasks," observes Case.

Also emerging: security as in-house consultant, offering services routinely and on request. Some of these inside "consultant shops" charge-back through faddish allocations.

Brokering Services

A next step for some is increased dependence upon outside services. Often when security moves outside, what's left inside diffuses. "Someone internally will have to broker the array of protective services and equipment options," points out William Cunningham, *Hallcrest Report II* project director and president, Hallcrest Systems Inc., McLean, Va. The inside broker needn't be a typical security director, though.

Automation also impacts security, especially the push to integrated systems. Security equipment manufacturers

MISSION IN TRANSITION

More administrative services

	Current	Emerging
Job:	Security Management	Facilities Management
Title:	Security Manager	Facilities Manager
First Tasks:	Security; Admin Services	Admin Service Security
Next Task:	Safety	Building and Grounds

Source: SECURITY

Security management becomes more all-encompassing with diversity.

SECURITY TIME

Time spent on pure security tasks

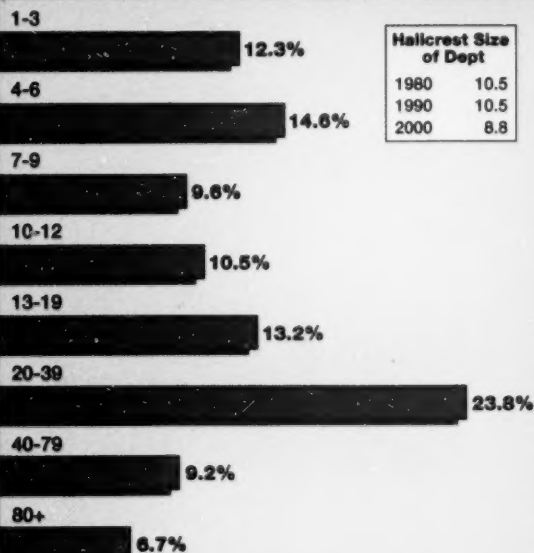


Source: SECURITY

More decision makers mix security with other, sometimes unrelated, tasks.

PROPRIETARY SECURITY

Number of staff directly supervised by security

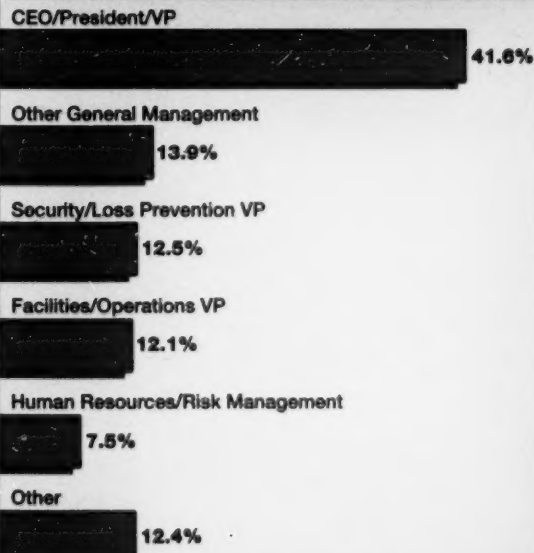


Source: SECURITY and Hallcrest Report II

Almost half of security decision makers supervise 12 or fewer employees. Projections point to less staff.

WHO'S SECURITY'S BOSS?

Percent of security that reports to:



Source: SECURITY

While some decision makers report to the top, many report to facilities, human resources or risk management.

THE SECURITY MISSION ADJUSTS

are "all after the same end — fully integrated systems that comprise security, facilities and management," admits John Schulte, vice president of marketing and sales, Javelin Electronics Inc., Torrance, Calif.

Emerging system integration mirrors the changing organizational structure that security now faces.

Equipment mergers will lead to new, higher level systems, in which some of security's separate identity is also lost.

Such changes can hit decision makers right where they sit — or used to sit.

Downsizing is a force to reckon with. Some downsizing may be a pendulum swing from past growth. "Too many security departments, especially within large organizations, were overstaffed and underperforming. It's catch-up time," contends Case.

Facing a Sluggish Economy

Sizing down also glitters more brightly in today's sluggish, some say recessionary, economy. The 1990s augur flat growth and uncertain profits. The goal of many businesses: be as lean as possible while maintaining a small management corps — cost-efficient and flexible.

There's a growing link between security and facilities management.

This "fewer people doing more" philosophy also spurs outside services.

Called outsourcing, and first used to convert proprietary to contract officers, the trend outside continues.

"I see companies contract everything out except the site security manager," says Alexander J. Autote, CPP, president, Asset Protection Resources Inc., Stamford, Conn. Even then, consultants and security engineers can replace management. Cost-sensitive firms quickly discover it's "cheaper to have someone come in, solve a problem and then leave," adds Autote.

Lamenting Hired Guns

"Hired guns! There's no commitment to overhead," laments Stevan Layne of Layne & Associates, Dillon, Colo. "But I don't care for it. Most consultants advise clients to have a security professional in-house."

MORE PROACTIVE PROGRAMS

Security decision makers offer prolific programs.

Program	Have	Direct	Involved
Security Awareness	88.3%	40.6%	13.9%
Safety Awareness	86.7%	14.8%	31.1%
New Employee Orientation	86.3%	5.3%	34.4%
Disaster Planning	85.9%	20.1%	29.5%
Security Staff Screening	76.8%	28.9%	15.6%
All-Employee Screening	72.1%	10.2%	20.9%
Ethics Policy	65.4%	3.7%	16.2%
Employee Assistance	64.1%	3.1%	19.1%
Computer Security	58.8%	16.2%	17.8%
Computerized Incident Program	41.8%	12.9%	10.5%
Community Outreach	38.7%	1.6%	13.9%

Source: SECURITY

Security directs programs with clear protection ties, and it gets involved with others in orientation, safety and planning issues. This sharing of programs leads to sharing of budgets and potential consolidations.

MORE SERVICE AND SHARING

Security decision makers cover diverse areas.

Function	Responsible For	Share Budget	Advise On
Investigations	68.0%	6.1%	16.2%
Safety	47.3%	10.9%	35.5%
Compliance	34.4%	6.4%	22.5%
Executive Protection	33.4%	4.1%	18.9%
Facilities Management	15.6%	7.4%	26.6%
Meeting Planning	13.7%	4.5%	18.0%
Transportation	12.5%	7.0%	21.3%
Telecom	11.9%	7.6%	25.0%
Mail Service	11.1%	4.1%	18.4%
Plant Management	9.8%	3.3%	20.5%
Human Resources	9.2%	6.6%	30.7%
Auditing	9.0%	4.3%	26.2%
Engineering	8.4%	2.7%	18.6%
Information Processing	7.8%	4.3%	21.9%
Architecture	5.5%	3.1%	41.2%
Marketing	3.1%	1.2%	13.5%

Source: SECURITY

There's a diversity of security, administrative and facilities tasks. Total is more than 100 percent because of multiple response.

THE SECURITY MISSION ADJUSTS

Layne and other security observers feel the profession has settled in. "There's less changing around now," argues Steven Keller, CPP, president, Steven Keller and Associates, Deltona, Fla. He minimizes as temporary any downsizing and consolidations.

Keller asserts that security is getting more complex. No longer the responsibility of, say, a personnel manager, safety and security deserve the "attention of a professional specialist," he believes.

Yet both Keller and Layne buck widening evidence of in-house security operations at risk.

For instance, *Hallcrest* shows that consultants and engineers will outpace in-house growth. It also predicts fast growth for equipment and alarm monitoring services — two areas that trade off people for technology. In addition, SECURITY's Profile already pinpoints consolidations — 12 percent of security departments answer to facilities and operations management while another 7.5 percent of security departments report to human resources or risk management.

More telling, security decision makers themselves — while sometimes denying it's a trend — spend more each year on services and buy gear that does more with fewer people. □



Customized Consultant Advice

Steve Howell, corporate security manager, 3M Co., has his area reflect missions and strategies of the company. A lean and flexible staff mixes generalist abilities with technical, security and planning specialties.

Howell actively delegates and seeks allies within other company areas — legal, human resources, operations, auditing, engineering and medical services.

Using a consultant approach, Howell and his staff work with plant engineers and office managers in 3M facilities throughout the world.

"It's our duty to analyze, come to conclusions and spot how business and financial trends impact security and the bottom line," says Howell.



Moving Forward Through Cooperation

Richard Mustafa, chief security administrator, City of Detroit Department of Water and Sewerage, protects a metropolitan community and its precious water supply.

Taking on more responsibilities, Mustafa's security function has reached right into the Detroit community with innovative awareness programs that encourage cooperation.

Managing primarily a proprietary force and mixing in security systems, Mustafa succeeds by emphasizing quality and lines of communication.

"A change of mindset from law enforcement to business is helpful," he says. It depends upon cooperation — getting people to do things by persuasion, not force.

SECURITY BUDGET

Total security expenditures this year

Less than \$25,000	7.0%
\$25,001 - \$50,000	7.2%
\$50,001 - \$100,000	9.1%
\$100,001 - \$250,000	18.8%
\$250,001 - \$500,000	14.4%
\$500,001 - \$750,000	10.1%
\$750,001 - \$1 million	11.0%
\$1,000,001 - \$2.5 million	11.8%
More than \$2.5 million	10.6%

Average Department Budget

1989: \$314,397
1990: \$335,000

Total Proprietary Costs

1980: \$6.25 billion
1990: \$13.6 billion
2000: \$16 billion

Source: SECURITY and Hallcrest Report II

A PERSONAL TRANSITION Slow evolution

Age	44
Education	37.5% have bachelor's degree
Background	26% have no law enforcement background
Salary	\$43,420
Current position	7.76 years
With organization	10.75 years
In security	12.86 years

Source: SECURITY

There's some increase in the budget with overhead growing more slowly.

Security decision makers are younger, better educated and more loyal than the typical worker.

ENDPIECES

Alerts and trends for your planning effort.

IN THE FUTURE

SECURITY's November issue is the 1991 *Directory of Products and Services*. This simple-to-use reference brings scores of security products and services within reach. Use the directory to help plan all of your 1991 purchases.

In December you'll meet SECURITY's 1990 Executive Achievement

Award recipient. Also in December, look for SECURITY's Special Report on Security Officers. The report will help security decision makers manage proprietary and contract officers, and it offers pre-employment screening suggestions. December's EQUIPMENT FOCUS takes a look at document destruction equipment. SECURITY SERVICES covers consulting services.

EVENTS

November 11 to 14

Disaster management is the theme for the National Fire Protection Association's (NFPA) fall meeting in Miami. Problems resulting from natural and man-made disasters are the focus. Contact NFPA's Meetings and Travel Department at (617) 770-3000 for registration information.

November 28 to 30

Communications and information security and investigations technology are the themes for Surveillance Expo 1990 in Crystal City, Va., sponsored by Tech Strategies Inc., Adamstown, Md. Contact Jim Ross at (202) 331-1125 for information.

November 28 to December 7

Barnwell, S.C.-based consulting firm BE Inc. hosts the Physical Protection Systems Training Course in Albuquerque, N.M. The course teaches attendees how to evaluate physical protection sys-

tems and how to determine appropriate upgrades. For information contact Gary Dewey at (803) 259-2346.

December 3 to 7

Aerospace Computer Security Associates and the American Society for Industrial Security sponsor the Sixth Annual Computer Security Application Conference in Tucson, Ariz. The conference explores operational requirements for both civil and military systems. For information contact Diana Akers at (703) 883-5907.

December 6 to 7

The American Society for Industrial Security sponsors the "Security Techniques and Strategies in the Transportation Industry" workshop in Jacksonville, Fla. The program explores approaches to deal with cargo theft, hijacking and property loss due to government seizure. Contact Mindy McDonnell at (703) 522-5800.

DEPARTMENTS OF INFORMATION

EQUIPMENT FOCUS is the place to learn what product lines ranging from padlocks to time lapse recorders have to offer.

To receive one copy of the following original EQUIPMENT FOCUS reports, use the reader service card.

Proximity Access Control Systems
September 1990

For information circle 180

Two-Way Radios
August 1990

For information circle 181

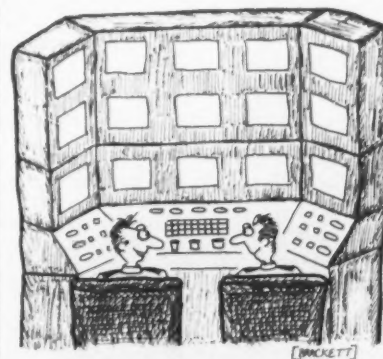
Guard Enclosures
July 1990

For information circle 182

Time Lapse Recorders
June 1990

For information circle 183

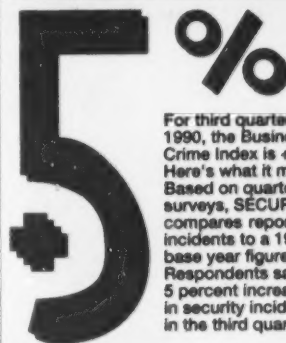
IN SECURITY



So what is it going to be tonight — monitor the building or watch 15 separate TV shows?

BUSINESS CRIME INDEX

SECURITY'S BUSINESS CRIME INDEX



Source: SECURITY

SECURITY's exclusive Business Crime Index appears quarterly in ENDPIECES.

QUICKIE QUESTION

Tell SECURITY how you secure your organization. Before you send in the Reader Service Card for product information, consider this Quickie Question.

Has your organization purchased and/or installed lighting to upgrade parking facility security in the past six months?

If you say YES, circle 185.

If you say NO, circle 186.

If you plan to purchase lighting in the next six months, circle 187.

If your organization does not have parking facilities, circle 188.

YOUR ANSWERS

In July, SECURITY asked readers if a key control problem at their organization contributed to an increase in security incidents in the past six months.

Among respondents, 38 percent say a key control problem contributed to an incident increase in the past six months. Another 51 percent did not experience key control problems. Eleven percent say key control doesn't apply to operations at their organizations.